



Financial Fitness

Starts with a Financial Plan!

Achieve your short and long-term financial goals through a personalized financial plan that meets your specific needs!

What is it?

A financial plan is a summary of your financial goals and the strategies designed to achieve them. Essentially, your goals are destinations, and the plan is the roadmap.

Who is it for?

Anyone who has financial goals. It is never too early or too late to get a financial plan to help guide your financial fitness!

Talk to a Financial Planner today about taking charge of your financial future and charting the course to help you successfully arrive at your desired destination.

1-877-WESTOBA | FinancialPlanning@westoba.com



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Financial Planning

What are the benefits?

- You are more likely to achieve your goals with one! A plan outlines action steps to follow within designed time-lines, while providing opportunities to review and amend or adjust.
- A plan helps you prioritize. As most resources are not unlimited, it's important to define what's really important to you.
- Financial planning helps individuals, families and businesses achieve peace of mind by identifying risks and putting plans in place to mitigate them.
- By consulting with a Financial Planner you can develop strategies on tax efficiency, maximizing income generation, protection of assets and income, as well as ensuring a proper estate plan is in place.



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To make an appointment, call **1-877-WESTOBA**, email **FinancialPlanning@westoba.com** or stop by any Westoba branch.