



BONNIE BARNES-TRACEY ADVISORY GROUP

What we do

Having a carefully crafted team of wealth professionals at our fingertips allows us to customize a solution that works for you. Here are the services we offer together with our CIBC partners:

- Comprehensive financial planning
- Customized wealth solutions
- Charitable giving & foundations
- Asset allocation strategies
- Estate planning
- Retirement planning & execution
- Insurance planning
- Intergenerational wealth transfer
- Tax-efficient investment strategies

Our Integrated Partners offer

- Commercial banking
- Private banking including mortgages and credit
- Trust & estate services
- Business succession
- High-net-worth and ultra-high-net-worth advisory services
- Wealth & tax strategies

Products and services we offer

- Investment advice
- Portfolio management and services
- Stocks
- Bonds
- Debentures
- Mutual funds
- Guaranteed investment certificates
- Alternative investments
- Options
- Structured notes
- High interest savings account
- Insurance annuities
- Life insurance needs, life, term, buy/sell, second to die, whole
- Estate protection

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