PRIVATE WEALTH MANAGEMENT

CIBC WOOD GUNDY

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A UNIQUE APPROACH

Estate planning is an emotional task with major financial consequences, which can feel overwhelming at times.

At CIBC, we help high net worth individuals ensure they have peace of mind to not only live the life they desire, but also a plan in place that ensures the preservation of their hard earned Estate Capital. A big part of our planning process is to help outline solutions to our clients that will help them enhance their estate legacy, while minimizing or offsetting taxes.

We are big believers in exploring all solutions available to clients' and presenting them in a very detailed, but easy to understand manner. This unique process ensures clients are comfortable with their estate plan, and that the particular products are in line with their goals & objectives.

PERSONAL PROFILE

Aaron's passion and belief in holistic financial planning drives his purpose to build deep client relationships. Utilizing a team that's entirely focused on family planning, helps guide him to finding the right solutions. Aaron believes in a client-first approach and loves solving complex personal and corporate estate planning issues. He gives his time generously to family planning, focusing on what matters most.

Outside of work, Aaron enjoys spending time with his friends and family outdoors, and golfing with his wife Chelsey.

CIBC PRIVATE WEALTH MANAGEMENT

CIBC Private Wealth Management offers comprehensive planning and a full range of wealth management solutions, including investment planning and asset management, cash management, credit planning, business planning and wealth protection. We carefully craft customized financial and investment solutions for your unique needs. In addition, we work with your professional advisors using our specialized knowledge and resources to consult on a range of strategies that may assist you with asset growth, wealth transfer, and tax minimization to grow and preserve your wealth for the future.

AREAS OF EXPERTISE

- Tax-sheltering opportunities
- Business succession planning
- Guaranteed income for life
- Philanthropic giving
- Tax-efficient wealth transfer
- Capital preservation
- Creating a lasting legacy
- Income protection