



## 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.

## 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.

## 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

"CIBC Private Wealth Management" consists of services provided by CIBC and certain of its subsidiaries, through CIBC Private Banking; CIBC Private Investment Counsel, a division of CIBC Asset Management Inc. ("CAM"); CIBC Trust Corporation; and CIBC Wood Gundy, a division of CIBC World Markets Inc. ("WMI"). CIBC Private Banking provides solutions from CIBC Investor Services Inc. ("ISI"), CAM and credit products. CIBC World Markets Inc. and ISI are both Members of the Canadian Investor Protection Fund and Investment Industry Regulatory Organization of Canada. CIBC Private Wealth Management services are available to qualified individuals. The CIBC logo and "CIBC Private Wealth Management" are registered trademarks of CIBC. Insurance services are only available through CIBC Wood Gundy Financial Services Inc. In Quebec, insurance services are only available through CIBC Wood Gundy Financial Services (Quebec) Inc.