• FINANCIAL SERVICES / WEALTH MANAGEMENT •

lasting LEGACY

Protect and grow your personal wealth

The long drive to the cottage after an intense work week is always worth the effort. Each trip north guarantees idyllic family time and the opportunity to escape the daily grind. From the joyful sounds of children playing on the dock to the tranquil landscapes: these are pleasures only life in Muskoka can bring.

You've worked hard to build this life and want to protect your family assets and legacy for decades to come.

"That's why protecting what you've built is a core priority for most emerging affluent and high net worth Canadians," explains Chris Karram of Safebridge Private Wealth. "Building your legacy requires more than a growing portfolio and some basic insurance planning – it requires a truly customized strategy from an experienced team of professionals."

Chris is himself a family man and Muskoka cottager who understands his clients' desires to build and protect their wealth, as well as ensure it can be enjoyed for generations.

Build – Protect – Multiply

The key, he says, is to adopt a "Build, Protect, Multiply" approach, which considers all aspects of acquiring and maintaining family wealth.

"Most of our clients know how to make money; it's making sure that once they have it that it continues to grow but is fully protected that matters most," says Chris. "They want to focus on what they know best: their business or their profession."

Using unique and highly customized insurance contracts and wealth management strategies, Chris and his team help their clients build and protect their wealth from tax erosion and loss of income.

"We delve into the most personal and important parts of our clients' lives to best understand their values and vision for their family future," says Chris. "By understanding their individual desires and goals, we are able design a truly personal strategy that ensures their future is properly protected and yet still poised for growth."

Every client comes to SafeBridge Private Wealth for different reasons, but a common refrain is they are looking for some form of tax reduction, or at least ensuring that every dollar is efficiently managed.

"Every business owner has a silent partner called the CRA, and I've never met a business owner or wealthy family that isn't interested in properly managing their tax liabilities," says Chris. "Through creative and highly specialized thinking, a strong team of finance and tax specialists, and over 20 years of experience, we find the right solution for our clients."

Making sure your Muskoka legacy lasts takes intentional planning and implementation. Chris and his team will guide you through creating a highly personalized strategy so that your only worry will be making the most of your family time in Muskoka.

After all, you can't put a price on memories.

PHOTOS SCOTT TURNBULL

Chris Karram of Safebridge Private Wealth

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