

## Mission Statement



To deliver knowledgeable and trustworthy advice to our clients in an understandable format that empowers them to make appropriate decisions that will move them toward their financial goals and objectives.

We will use state of the art planning tools and may refer other professional advisors, to provide the best possible solutions for our clients and prospective clients.

## Group History



September 2002, the merger of Sun Life and Clarica prompted the formation of our first partnership with Erven Planning Inc. and TOLCO Financial Strategies

December 2004, we formed Westmount Group Inc. to purchase our new office space in Westmount Place.