Onvisor

Amplify Your Wealth

Achieve More with Planning for Professionals & Business Owners

Onvisor

Find Your Financial Blueprint

At Onvisor, we specialize in providing tailored financial solutions designed to fit your unique needs. From personalized insurance planning and strategic wealth management to empowering educational programs, our goal is to guide you confidently toward a solid financial future.

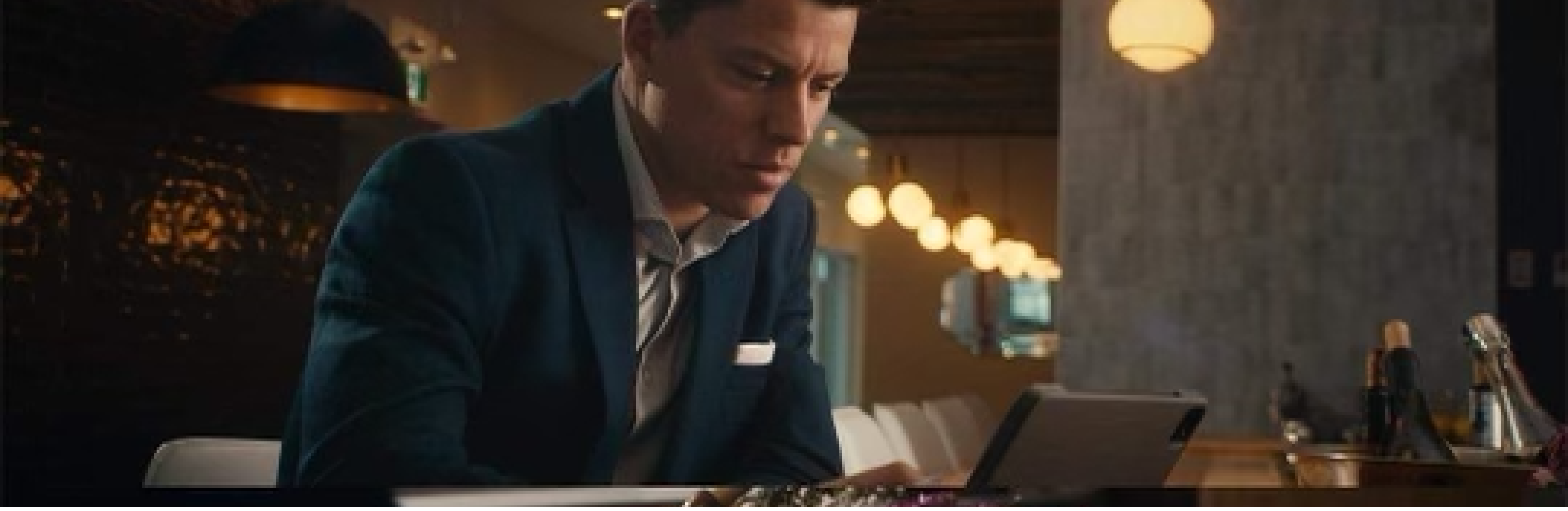
Meet Your Advisor

Marcel LeBlanc, CFP, CIM

Certified Financial Planning Expert with over 18 years of experience. He is dedicated to simplifying personal finance and empowering clients to achieve their financial goals through personalized, straightforward guidance.

Solutions Tailored for You

At Onvisor, we believe that a personalized approach is the key to long-term success. Our comprehensive services are designed with your unique circumstances in mind.



Insurance Solutions

Secure your future with tailored insurance planning.

- **Life Insurance:** Protect your loved ones with policies suited to your needs and budget.
- **Disability Insurance:** Maintain your income if you're unable to work due to illness or injury.
- **Critical Illness Insurance:** Gain peace of mind with coverage supporting you through health crises.
- **Business Protection:** Safeguard your enterprise with key person insurance, buy-sell agreements, and creditor coverage.
- **Tax & Estate Planning:** Use insurance strategically for tax management, wealth preservation, and estate transfer.

We offer personalized assessments and clear options, using videos and concise sheets to help you decide confidently. Our virtual process makes it easy and efficient, saving you time with electronic signatures and remote meetings.

Investment & Wealth Management

Grow your assets con dently with our innovative investment solutions.

We partner with industry leaders to deliver options suited to your goals:

- **Automated Investing (Nest Wealth):** Low-cost, robo-advised investing with ETFs, automatic rebalancing, and transparent fees.
- **Active Portfolio Management (Louisbourg):** For portfolios over $250,000, this premium service offers personalized, hands-on management from prestigious local experts with strong track record of growth & stability.

Segregated Funds: Insurance-based investments with capital guarantees, estate benefits, and creditor protection—perfect for growth with security.

Recommended investment solutions are tailored to your goals and preferences. We ensure transparency and convenience with electronic signatures and virtual meetings for easy, secure management.

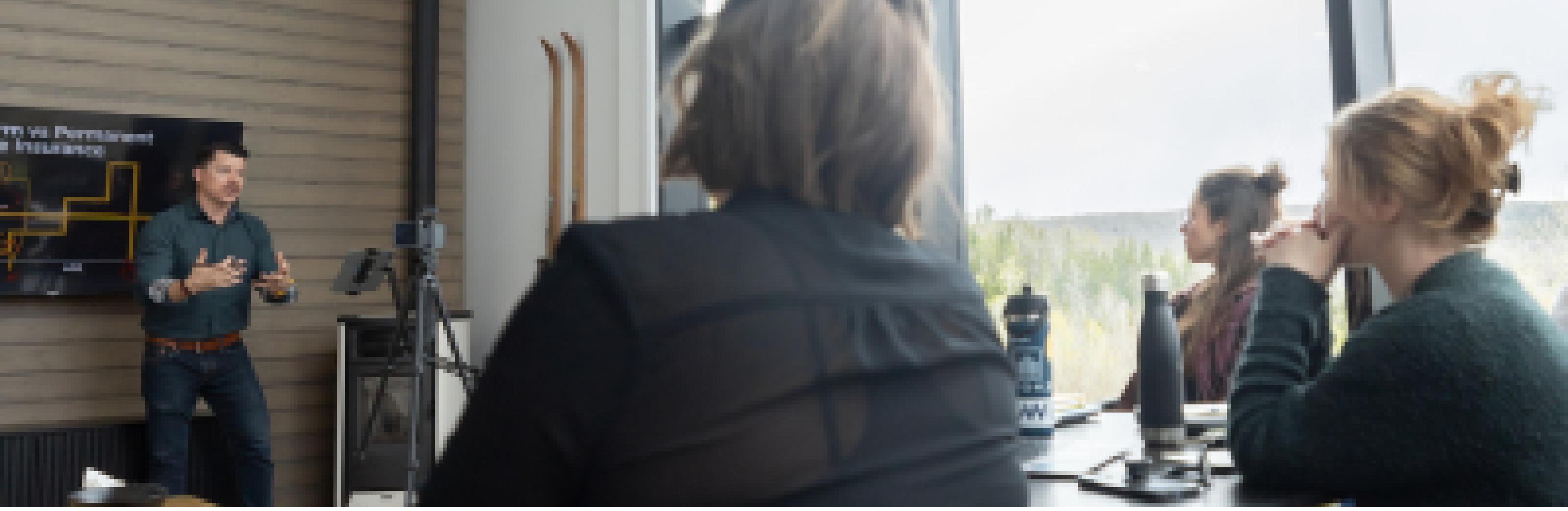
Strategic Planning & Financial Advisory

Long-term success hinges on a clear financial roadmap.

- Retirement Projections
- Debt Management
- Estate Planning
- Tax Strategies

Unlike conventional plans, we take a step-by-step approach, keeping you involved throughout the process. Our proprietary "*Accumulation Cascade*" simplifies complex financial accounts into three actionable "**buckets**"helping you visualize and manage your wealth—whether you're in the accumulation or de-accumulation phase.

Guided by Experience: Our advice considers your pension, risk appetite, and lifestyle goals to ensure your wealth sustains your retirement dream. Using virtual meetings and tools like Notta to track action items, we make your financial journey as seamless as possible.

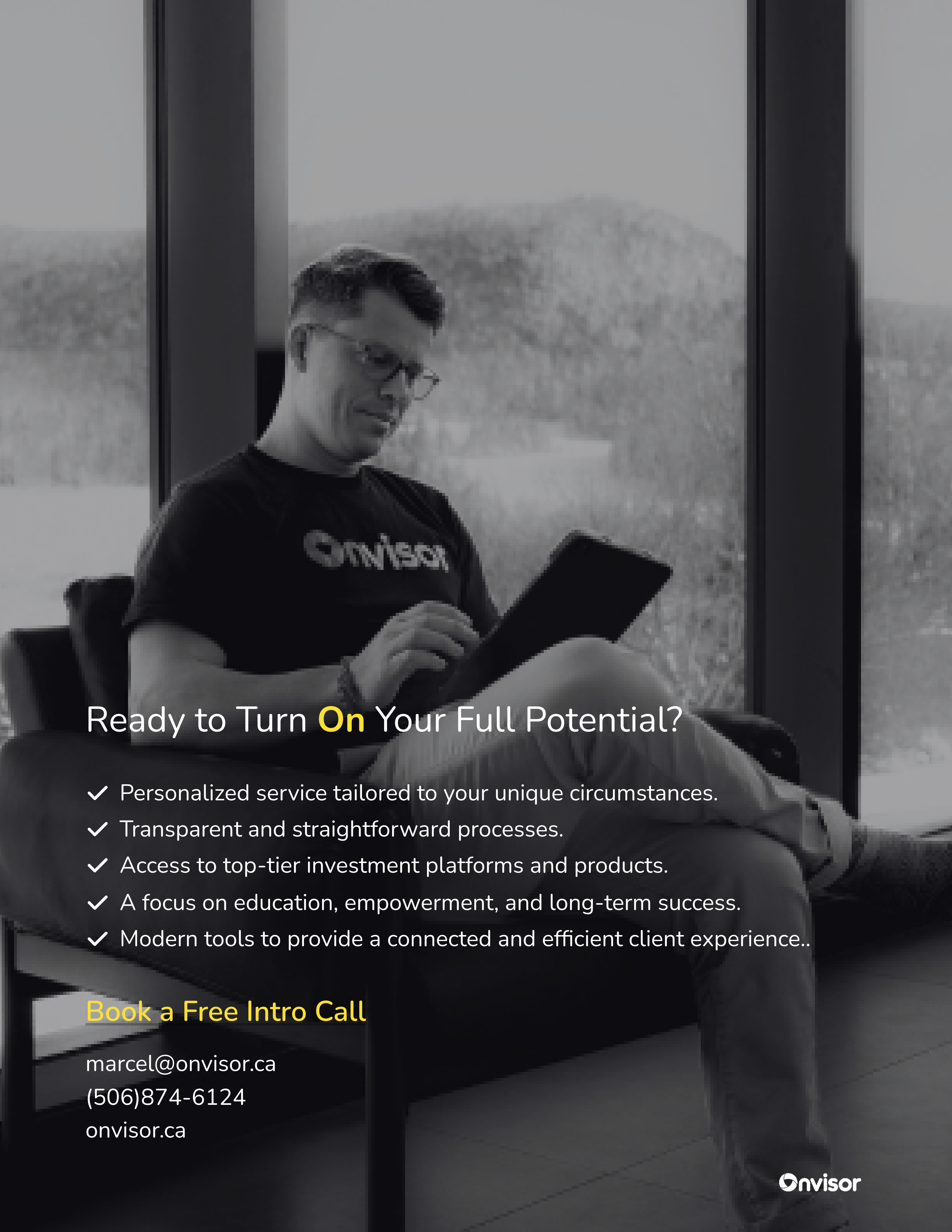


Coaching & Educational Programs

Financial Wellness through accessible programs:

- **Plan Your Finances Project (PYFP) Academy:** Self-paced online courses with videos and tools to master your finances.
- **One-on-One Financial Coaching:** Personalized virtual sessions with Marcel for tailored advice and strategies.
- **Workshops for Your Team:** From lunch-and-learn sessions to full-day masterclasses, our workshops build financial literacy and well-being within organizations.

Every coaching & workshop participant receives access to Plan Your Finances online courses and we offer discounted 1-1 coaching packages for group workshop participants.



Ready to Turn **On** Your Full Potential?

- Personalized service tailored to your unique circumstances.
- Transparent and straightforward processes.
- Access to top-tier investment platforms and products.
- A focus on education, empowerment, and long-term success.
- Modern tools to provide a connected and efficient client experience..

Book a Free Intro Call

marcel@onvisor.ca
(506)874-6124
onvisor.ca

Onvisor