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Project: Newport Private Wealth – New Website**

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| **Client: Newport Private Wealth** | **Created By: Elan** | |
| **Project: New Website 2024** | **Docket: NWPT-006 OCT23** | |
| **Requested By: Elizabeth** | **Date: February 20, 2025** | **Version: Wealth Planning** |

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| ***Section Type:*** | **Section Title: What We Do – Wealth Planning** |
| Meta | Tag  Newport Private Wealth: What We Do - Wealth Planning  Description  Asset and income protection, estate and succession planning, tax planning, etc. These form the basis of Newport's wealth management practice. |
| Header | What We Do: Wealth Planning |
| Intro Blurb | **Solutions For Every Life Stage**  At Newport Private Wealth, financial planning is an essential component of our comprehensive wealth management strategy. We work together with Portfolio Managers to offer personalized solutions to meet client's unique financial goals. Our team approach helps to guide clients through all stages of life, from wealth accumulation to living in retirement and planning for wealth transition. |
| Life stage #1 | **Wealth Accumulation**  During the wealth accumulation phase, we work closely with clients to define their goals and develop a comprehensive long-term financial plan. This involves disciplined investment management, tax-efficient saving strategies, and risk mitigation to create a strong financial foundation. For families with young children, for example, we may recommend life insurance solutions for added protection or strategies to help maximize tax-free investment growth beyond traditional RESP contributions. |
| Life stage #2 | **Living In Retirement**  As clients transition into retirement, we focus on meeting their income needs while also identifying the most tax-efficient strategies for drawing on their assets. Some clients, for example, may benefit from taking early CPP or OAS pension, converting their RRSP to a RRIF before the mandatory deadline, or drawing dividends from their private corporation. |
| Life stage #3 | **Wealth Transition**  Many of our clients seek guidance not only with estate planning but also in identifying the most tax-efficient strategies for transferring wealth during their lifetime. This often involves helping children purchase or renovate a home, supporting business ventures, or funding charitable causes, allowing them to witness the positive impact of their wealth firsthand. |
| Our Promise | **Our Promise**  Throughout every life stage, we collaborate with your existing advisors—such as accountants and lawyers—to help develop the best possible solution for you and your family. |
| Videos | **More Than A Portfolio, It’s A Plan**  Turning high income in high net worth [Video]  Play Video [Button]  Providing a more predictable income at lower risk [Video]  Play Video [Button]  Comprehensive planning for an entrepreneur [Video]  Play Video [Button]  [  **Top of Form**  **Bottom of Form** |
| CTA | **Are You In Need Of Wealth Planning Expertise?**  Connect with our team today [Button] |