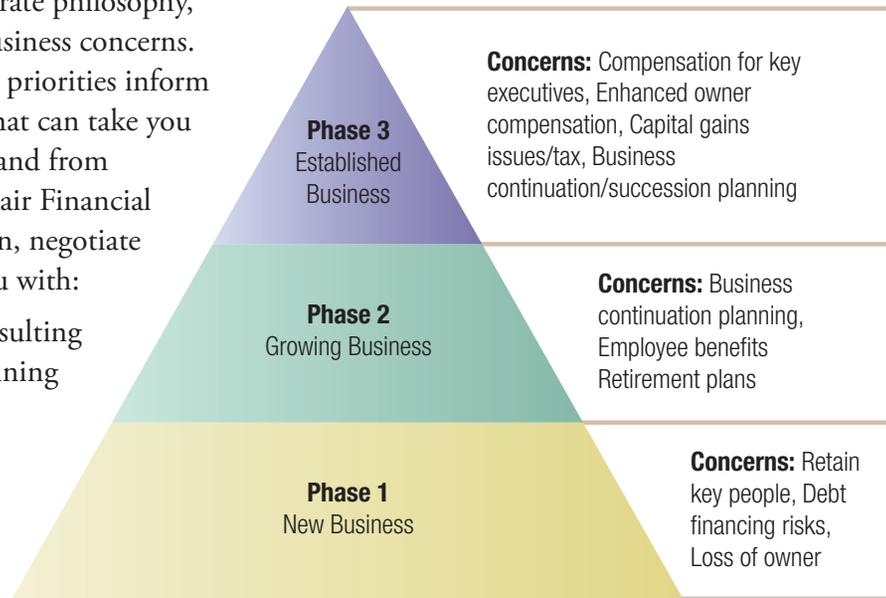


Business Planning As your business grows your needs and concerns change. Blair Financial Services can help your firm create a secure, sustainable plan to keep key employees, manage change, deal with milestones & unexpected events, and navigate critical financial issues.



The Blair Financial Services team works to align plans with your corporate philosophy, culture, future plans and business concerns. Your firm's needs, goals and priorities inform the creation of a program that can take you from start-up to enterprise and from ownership to retirement. Blair Financial Services can construct a plan, negotiate on your behalf and help you with:

- Employee Benefits Consulting
- Business Insurance Planning
- Succession Planning
- Business Continuation Planning
- Tax Planning & Efficiency
- Personal Wealth Management & Planning
- Personal Insurance Planning



An Integrated Solution

At Blair Financial Services, we recognize that it can be time-consuming and difficult to differentiate between solutions available in the marketplace. We simplify choices for our clients by providing a clear, integrated process in developing an effective competitive plan. Our Integrated Solutions look at the big picture, uncovering unmet needs through an analysis of your existing program's ability to provide a competitive advantage with Key Employee Coverage, Individual Insurance (i.e., owner or key executives) and Group Insurance.

To set up an appointment, please contact us.

General Inquiries

t: 519.886.3257
 e: info@blairfinancialservices.com
www.blairfinancialservices.com

Iain Blair, B.Sc., RHU, CLU, CEBS

t: 519.886.3257 ext 211
 c: 519.496.0691
 f: 519.886.8639
 toll free: 855.886.3257
 e: iain@blairfinancialservices.com

Aaron Cyr

t: 519.886.3257 ext 212
 c: 519.498.1848
 f: 519.886.8639
 toll free: 855.886.3257
 e: aaron@blairfinancialservices.com



Benefits Consulting

Attracting and retaining the dynamic, innovative people needed to keep your business on top means having benefits as good, or better, than your competitors.

Staying On Top

Blair Financial Services takes the opportunity to understand what you need, why you need it, compare it against your existing plan, current compensation system and industry best practices. We then work with your team to develop a program designed to fill gaps and areas where coverage or products are lacking or missing altogether. An Integrated Solutions program with Blair Financial Services helps:

- Achieve funding efficiency
- Mitigate risks
- Maximize flexibility
- Realize tax efficiency
- Protect and retain executives
- Benchmark against competition
- Maintain excellence

Group Retirement Planning

A successful Group Retirement Program (GRP) is a major component of your firm's benefit plan; it can give your firm an advantage in competing for top talent when considered in the context of compensation. As such, a successful GRP should deliver maximum ROI for your people and management for your team; all within the bounds of a unique regulatory environment.

Blair Financial Services works with plan members and your HR teams to:

- Benchmark plan cost for available service providers and retail options available to plan members
- Evaluate plan design within context of current compensation system
- Evaluate manager performance and risk, relative to index and peers
- Provide clarity regarding “active” versus “passive” investment options and their roles in portfolio management
- Monitor managers and provide alerts should a fund manager deviate from the chosen mandate
- Offer a choice of plan defaults for plan members
- Ensure compliance with Capital Accumulation Plan (CAP) guidelines
- Conduct annual review of plan design and performance
- Provide regular communications & education to help teams make informed choices

Employee Communication & Education

Helping plan members – your employees – understand and make informed choices regarding financial products is part of the services Blair Financial Services offers:

- Weekly market reviews
- Annual CAP plan review & member survey
- Web-based self-service tools
- 1-to-1 in-person, online and phone support
- Quarterly newsletters
- Group meetings
- Seminars
- Lunch & learns

Get Started

Contact Blair Financial Services today. Our comprehensive approach to Benefits Consulting and ongoing maintenance will help your firm retain those key employees and increase satisfaction, while managing workload for your internal teams.

To set up an appointment, please contact us.

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