

# THE NORTHERN ADVISOR

Informed clients make informed decisions

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**Monahan Financial Planning Group**  
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**We've Moved! Same Building.  
Same Floor. New Suite.**



**Look for our signage when you step off the  
elevator on the 6th floor.**

## Mission Statement

At Monahan Financial Planning Group, our mission is to work alongside you in identifying and then providing solutions to your investment and insurance needs. Our proven methods, knowledgeable staff, and extensive product selection will ensure we are able to bring peace of mind to the decisions made. Big or small, our dedicated team will help you bring your plans into reality.

## WE HEAR YOU

We will take the time needed to ensure we hear what you are saying. Through getting to know you we will be better able to develop the correct plans for you.

## WHICH WAY IS UP

One qualified team will develop the MAP for our clients to follow to ensure the ideas you have can have the correct dollar amounts attached to them.

## NO ONE GETS LEFT BEHIND

We strive to ensure regular contact with our clientele to make sure their plans stay accurate and up to date over time.

## NO STRANGERS HERE

You won't have to call 1-800 numbers. You won't find a new face across the desk with every meeting. We strive to find and maintain a quality team within our business so you will have a familiar face greeting you at the door and answering your calls.

## YOU'RE #1

Our team places great importance on maintaining our professional skill development through continued education and training so we can provide the best service to you.

## WE VALUE VALUES

We will look to add team members that share and value integrity to ensure our clients' priorities are placed before our own.

# Welcome to the new Canada Life

Three great Canadian companies – Great-West Life, London Life and Canada Life – are coming together under one brand – the new Canada Life.

You may already know that Great-West Life, London Life and Canada Life have operated as separate brands under the same umbrella for nearly two decades. Now, they'll be transitioning to one brand – Canada Life.

Nothing changes for you. Your policy coverage and account will stay the same and you can reach these companies the same way you always have. Your relationship with Monahan Financial Planning Group won't change either.



## Combining our strengths

For over 125 years, these three companies have been trusted by Canadians for keeping their promises and helping Canadians reach their full potential, every day.

This transition to one brand will allow Canada Life to combine strengths so they can better deliver on their purpose – to improve the financial, physical and mental well-being of Canadians.

## Existing brands

You'll continue to see the Great-West Life, London Life and old Canada Life logos for some time as they transition to the new Canada Life brand.

### Your policies

Although we're changing to one brand, your policies with us will remain the same.

### Your advisor

You'll continue to work with the same advisor you know and trust. We'll continue to be here to help you reach your financial goals.


### What's next

We'll keep you up to date as we transition to the new Canada Life.

## New brand, same commitment

If you're one of the millions of Canadians that rely on Canada Life for insurance or investments, their commitment to providing you with excellent customer service every step of the way won't change.

They'll focus on doing the right thing at the right time for our customers.

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## What We Do

### We specialize in:

#### Personal and Family Planning

- Individual life insurance
- Segregated fund policies
- Mutual fund plans
- RRSPs, non-registered and TFSAs
- RDSPs and RESPs
- Payout annuities, RRIFs and LIFs
- Individual disability insurance
- Travel insurance
- Mortgages\*



#### Corporate planning

- Corporate insurance
- Group health insurance
- Group help
- Group pensions/retirement plans
- Mortgages\*

\* We can refer you to a London Life credit planning consultant.

## We look forward to building a full financial plan tailored to your needs.

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