

Service Solutions

Your Full Service Solution Provider

Serre Financial conducts a situational review and thorough analysis of both personal and business aspects with their clients, which provides the framework for recommendations that best fit the client and their situation.

The core objectives of this process are to:

- ✓ Find ways in which there may be immediate savings
- ✓ Review and evaluate potential longer-term benefits to clients

With over a decade of providing first-class solutions and excellent service, Serre Financial makes their clients more money.

Key Solutions

Immediate Tax Savings and Cash Flow Increase

Incorporation
Corporate Restructuring
Business Financial Analysis & Consulting
Employee Profit Sharing Plan
Private Health Services Plan
Health & Welfare Trust

Increase Retirement Benefits and Tax Minimization

Corporate Restructuring
Business Financial Analysis & Consulting
Employee Profit Sharing Plan
Health and Welfare Trust
Individual Pension Plan
Retirement Compensation Arrangement

Business Exit Strategies and Planning
Business Financial Analysis & Consulting
Individual Pension Plan
Business Exit Strategy Planning
Retirement Compensation Arrangement

Estate Planning
Individual Pension Plan
Retirement Compensation Arrangement
Trust Services