

Wade Perkins, CFP®

SENIOR FINANCIAL ADVISOR



With over 20 years' experience in providing full-service wealth management to business owners, families and individuals in the Parry Sound area, Wade has developed a reputation for providing excellent advice and integrated solutions to all of his valued clients.

As the Senior Financial Advisor at Spire Advisors of Assante Capital Management Ltd. in Parry Sound, Wade most often finds himself assisting business owners, and their families.

"In Parry Sound, many people either own a family business, or work for one. Generally, business owners are fully occupied with running their company on a daily basis. My role is to provide the type of support that will allow them to focus on their day-to-day, while I work with other professionals (lawyers, accountants, etc.) to meet their long-term needs.

Oftentimes, I find myself helping these individuals with the complicated tax planning that must be integrated with their family planning, in order to reduce tax implications and liability down the road.

My primary goal is to focus on what benefits the individual, and their family, in the long run. Listening to my clients, and understanding their priorities 'beyond the money,' is a key factor in what I do.

Ultimately, it's not always about the money. I want my clients to walk away feeling confident in the fact that I am fully dedicated to taking care of their best interests in a professional manner."

PARRY SOUND OFFICE

Assante Capital Management Ltd.

705-746-2131 / 97 James St.



follow us on social media @assante.spire.advisors

www.spireadvisors.ca

Assante Capital Management Ltd. is a Member of the Canadian Investor Protection Fund and Investment Industry Regulatory Organization of Canada.



Spire Advisors