



PROVIDING FOR A LIFETIME

Securing the Future for Disabled Loved Ones

Planning for Tomorrow.

Living with a disability can be expensive. Families can face higher costs in addressing medical needs, personal care aides, support programs, technical devices, and specialized equipment. There are programs to mitigate some of these costs but even with these supports in place, added expenses can create financial strain and concern for the future. Canadians with a disability are more likely to age into poverty, and are burdened with higher costs than non-disabled seniors. A comprehensive wealth plan addresses these challenges and provides security for today and tomorrow.

FULL WEALTH PLANNING

Areas of Specialized Support

GOVERNMENT PROGRAMS

- Disability Tax Credit Applications & Appeals
- Registered Disability Savings Plans
- Family Supports for Children with Disabilities
- Child Disability Benefit
- Medical Expense Credit

TRANSITIONING TO ADULTHOOD

- PDD & AISH
- Guardianship & Trusteeship
- Student and Education Supports
- Disability Supports Deduction
- Trusts, to Protect Social Assistance

AGING WITH DIGNITY

- CPP, Canada Pension Plan
- OAS, Old Age Security
- Managing Inheritances
- Rollovers to RDSP's



Everyone has the right to a comfortable and healthy future.



OUR MISSION

LONG TERM FINANCIAL SECURITY FOR EVERYONE

Audrey believes in financial well-being for all Canadians. She leads a wealth management practice centered on providing financial advice and strategies for families supporting dependents with a disability. She ensures families have effective access to supports and programs through periods of transition and at all life-stages. Creating solutions that transcend generations so families can secure a comfortable and healthy future.

For more details
Audrey.Veltri@ig.ca
403.619.0410



Audrey Veltri, IG Wealth Management



Investors Group Financial Services Inc.

Trademarks, including IG Wealth Management and IG Private Wealth Management, are owned by IGM Financial Inc. and licensed to subsidiary corporations. The Canada Disability Savings Grant and the Canada Disability Savings Bond are provided by the Government of Canada. Insurance products and services distributed through I.G. Insurance Services Inc. Insurance license sponsored by The Great-West Life Assurance Company.