+1(480) 722-9414 info@transitionfinancial.com

I NEED HELP MOVING TO/LIVING IN THE USA

Pathways to the USA

I NEED HELP MOVING TO/LIVING IN CANADA

Pathways to Canada

Transition Financial Advisors Group Inc. – *Established in 2001*

TRANSITION FINANCIAL ADVISORS GROUP, INC.

Welcome and thank you for your interest in Transition Financial Advisors Group, Inc.! Established in 2001, we are the worlds first boutique Canada/US financial advisory firm. We are dedicated to providing customized US & Canada tax, financial planning and wealth management solutions in a seamless way. You have found the place where you can have all of your financial needs met under one roof.

We can:

- Plan for and prepare your Canadian and US tax returns, ensuring they are coordinated to optimize your overall tax situation and minimize your overall tax burden
- Manage a coordinated portfolio of investments with accounts located in Canada and/or the US and in either currency, all presented on one statement in the currency of your choice to allow you to track the progress you have made towards your retirement goals
- Help you design an estate plan for heirs living in either country, while giving you maximum control and mitigating your estate tax liabilities in both countries
- Coordinate your entire financial situation to help you achieve the cross-border lifestyle you desire
- Provide expertise from renowned authors and speakers, who have credentials in both Canada and the US
- Serve you through technology no matter where you live

WE WROTE THE BOOKS ON IT

Real-Life Tax and Financial Insights into Moving to and Living in Canada and the US

What We Do

We are financial planners first, although we prepare tax returns, do tax planning, help with estate planning, etc. in your Canada/ US situation.

What We Don't Do

We have a firm-wide belief that understanding your overall personal and financial situation leads to better recommendations for you

Who We Help

We have developed a large network of trusted professionals to service a broad range of clients who are living in or moving to Canada or the US

What Makes Us Different?

One Stop Services

We offer tax planning and preparation, managing stranded investments in Canada and the US, estate plans and more

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People That Live It

Having helped hundreds of families transition across the Canada/US border, we live it with you every day and take your financial success personally!

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Personal Approach

We get to know you as an individual and understand your personal situation and then we build a plan for you

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Our Transition Experience

We have perfected a unique, comprehensive planning process that ensures we cover all the details

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Direct Access To The Experts

Talk with an experienced, qualified expert who has a thorough understanding of your financial situation, as well as the issues and opportunities an international relocation can present

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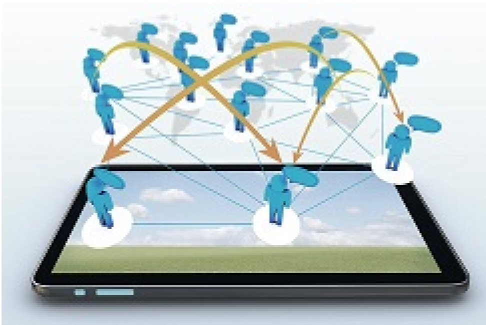

Our Network

We have a large network of professionals across Canada and the US who are ready to advise on any situation.

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Canada/US Investment Solutions

Transition Financial Advisors Group, Inc. is the first boutique wealth management firm that can provide a comprehensive solution for those with investments located in both Canada and the US, all under one roof. This gives you the utmost in convenience when dealing with the complexities of investments located in both countries, in different currencies, by coordinating and presenting it to you on one statement in the currency of your choice. Our approach to investing is grounded in the research that comes out of the institutional world where trillions of dollars are managed. Through our institutional partners, TD Ameritrade in the US and NBIN in Canada, we deliver an institutional investment solution to the retail investor. Our expert, unbiased advice is coordinated with your tax, financial and estate plans to further optimize the use of your foreign tax credits and meet your financial and lifestyle goals while giving you peace of mind in turbulent times. In addition, our institutional relationships allow us to provide the highest level of asset protection for you, while assisting you with the complexities of assets stranded on either side of the border.

To manage your RRSPs, RRIFs, LIRAs in Canada while living in the US

LIVING IN THE US

To manage your IRAs, 401(k)s, 403(b)s in the US while living in Canada

LIVING IN CANADA

FOUNDER’S MESSAGE

GET TO KNOW US

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First Name

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☐ I give Transition Financial Advisors Group, Inc. permission to collect and use my data submitted in this form.

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