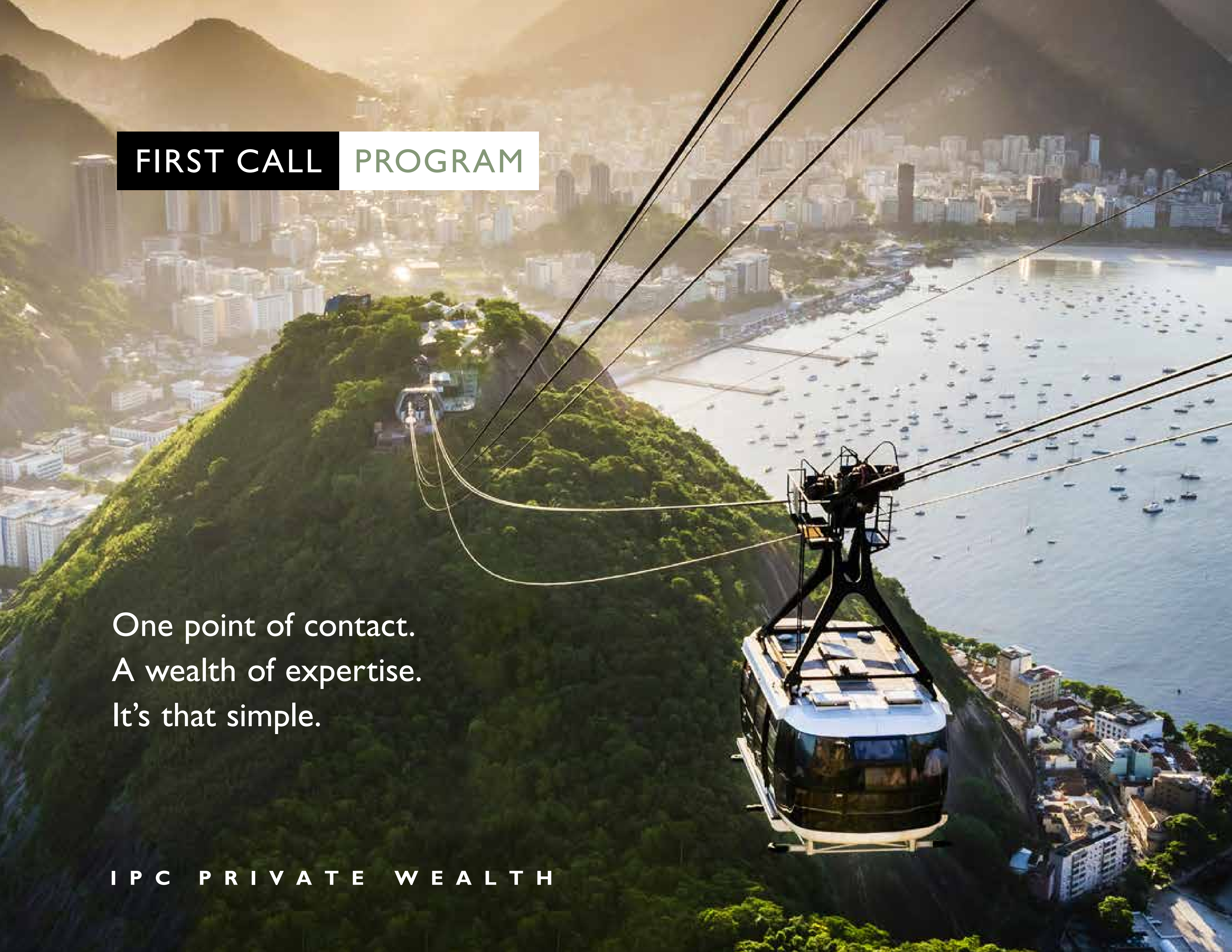

FIRST CALL PROGRAM

One point of contact.
A wealth of expertise.
It's that simple.

IPC PRIVATE WEALTH

FIRST CALL PROGRAM

As your wealth grows, so does the complexity of your needs. Tax and estate planning, legal advice, asset protection, philanthropy, international services... What if you could have access to specialists in all of these areas and more through one central point of contact?

First Call connects you with the professionals you need, when you need them.

Coordinating your needs. Simplifying your life.

At IPC Private Wealth, we go above and beyond traditional wealth management by helping you address a wide range of needs that contribute to your financial well-being.

It all starts with a trusted relationship with your IPC advisor. Together, we build a financial road map to your goals. Then, we implement your financial plan by drawing on IPC's exclusive network of specialists, resources, and suppliers. These professionals work effectively to provide coordinated strategies and solutions that enhance your wealth – and your enjoyment of it.

Through your IPC advisor, you can rest assured that all of your needs are being met. Giving you more time and energy to spend on what's really important to you. It's that simple.

IPC Private Wealth surrounds you with expertise.

At IPC, we have long provided clients with sophisticated investment management founded on portfolio customization and personal attention.

Now, we are also your First Call when you require more specialized advice and services – someone to plan business succession, perhaps, or even to develop a care management plan for an ailing relative.

With an understanding of your unique financial needs and goals, your IPC advisor is ideally positioned to work with the various specialists you require. With First Call, you can be sure that we will always direct you to an appropriate resource.

It's all part of the exceptional standard of service we provide to our most valued clients.

As a qualified client of IPC Private Wealth, you have access to a wide range of expertise including:

International Services Do you hold assets or spend extended periods in the U.S.? We provide cross-border investment management that focuses on asset protection and tax efficiency.

Accounting Advice on complex tax issues and opportunities in Canada, as well as cross-border and expatriate tax.

Estate Planning Reduce tax, maximize your estate, and continue to control the assets you bequeath to heirs.

Asset Protection Protect your assets, including your income stream, through insurance planning.

Legal Access to legal professionals to address specific, complex issues.

Business Advisory From shareholder arrangements and business valuations to exit strategies and retirement goals, entrepreneurs require special solutions.

Philanthropy Strategies for sharing your wealth through charitable organizations in a directed, tax-efficient, and lasting manner.

Elder Care If you need assistance caring for a loved one, we can refer you to elder care or other care management specialists.

Private Health Care Exclusive medical facility provides comprehensive health diagnosis with access to your specialists in one place.

VIP services Enjoy special advantages and priority service through our partners.

FIRST CALL PROGRAM

This page illustrates the scope of IPC First Call. If a different kind of need arises, we will do our best to see that it is resolved.

LEGAL

- Family/Matrimonial Litigation
- Purchase/Sale of Property
- Shareholder Agreements

STRUCTURED LIFE INSURANCE SOLUTIONS

- Buy/Sell Agreements
- Alternative Financing Strategies
- Dependency Funding for Children and Surviving Spouse
- Tax Liability Funding
- Estate Equalization
- Capital Maximization
- Insured Annuities (back-to-back)

INSURANCE

- Individual Life and Group
- Critical Illness
- Long Term Care
- Disability

WEALTH SOLUTIONS FOR PROFESSIONALS

- Retirement Compensation Arrangements
- Individual Pension Plans

INTERNATIONAL TAX SERVICES FOR BUSINESSES

- Canadians doing Business in the U.S.
- Expatriate Tax
- Mergers and Acquisitions
- State and Local Taxation
- Accounting for U.S. Income Taxes

TAX SOLUTIONS

- Corporate Tax Planning
- Family Tax Minimization
- Business Transition and Succession Planning
- Asset Protection

INTERNATIONAL SERVICES FOR INDIVIDUALS

- Cross-border Investment Management
- U.S. Citizens and Green Card holders living in Canada
- Canadians investing in U.S. Real Estate

ESTATE PLANNING

- Asset Valuation
- Asset Transfer
- Wills
- Executor Services
- Trusts
- Inheritance
- Powers of Attorney

TRUST ESTATE AND SUCCESSION PLANNING

- Tax Compliance for Estates and Beneficiaries
- Tax Planning for Family Trust Returns
- Business Transition Services
- Structuring Estate Freezes
- Intergenerational Wealth Transfers
- Estate Bonds
- Charitable Gift Planning

DOMESTIC AND INTERNATIONAL BUSINESS TAX SERVICES

- Financial and Tax Due Diligence on Acquisitions, Private Company Sales, and Divestitures
- Mergers and Acquisitions
- Capital Raising and Valuations Services, Private Equity
- Financial Restructuring
- Protection from Creditors
- Sale and Purchase Advisory Services
- Business Valuations
- Litigation Support and Dispute Resolution

HEALTH PLANNING

- Comprehensive Health Diagnosis
- Year-round Dedicated Health & Wellness Care
- Preferred Medical Provider Network

OTHER SERVICES

- Elder Care
- Loan Collateral
- VIP Priority Services

FIRST CALL PROGRAM

First Call is an exclusive service that connects our high net worth clients to the professionals they need to enhance their wealth and simplify their lives.

Whatever your need or situation, we are here to guide you.

We are your First Call.

Paul Edmiston, CFP
Senior Wealth Advisor

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