



Desjardins
Financial Security®
Investments Inc.

take care of your business

PROTECTING ONE OF YOUR MOST
IMPORTANT ASSETS

The Kilcona branch of Desjardins Financial Security Investments Inc. enjoys an enviable position as one of the most profitable, best-run branches in the country.

Its newest advisor, Angie Wittmann, helps strengthen its position even further, bringing a unique new set of services for entrepreneurs to the table.

“What I’ve seen in the last number of years is people aren’t necessarily taking care of their most important assets. Their pride and joy is that business they created and also their ability to earn an income,” says Angie. “They’re insuring their houses, they’re insuring their cars, but what do they have to protect themselves if something happens to them with their business?”

The culmination of 25 years in diverse areas of finance, Angie found her “ideal situation” at Desjardins Financial Security Investments Inc.’ Kilcona Branch, which is led by Vice-President and Certified Financial Planner (CFP) MaryAnn Kokan-Nyhof.

The mission and values of Desjardins, the

100-year-old co-operative, perfectly align with the type of service Angie provides for clients — a big-picture, ‘deep dive’ approach to financial planning that works with all the players in your business and personal life, from legal and tax to accounting, investments and risk mitigation.

“Generally business owners have put all their money and all their time into their business and they’re not necessarily as diversified as they’d like to be,” she explains. “I want to be able to create those stories — not the ‘What-if’ stories but the, ‘Oh thank goodness we did this’ stories. ‘We’ve planned it, we have the emergencies taken care of, we don’t have anything to worry about.’”

Any number of health and life scenarios can affect a business. Angie takes a proactive approach to make sure clients prepare for potential outcomes to avoid hassle and heartbreak.

“We’ve got some life insurance solutions that may, in certain situations, provide protection from the policy owner’s creditors,” she says.

Angie has devoted a lifetime to working

with entrepreneurs, as a CFP professional with diverse experience as an independent stock broker, a career in the credit union system, handling investments for businesses, non-profits and charities, and working with a Crown corporation to provide commercial financing to businesses.

As a salaried advisor at Desjardins Financial Security Investments Inc., there is never any pressure to sell a product, just a genuine desire to help clients.

Angie is also the kind of person who believes in continuously improving her skills to better serve her clients. She recently completed life, accident and sickness insurance licensing requirements, and is in the process of getting licensed and contracted in Manitoba. She is currently completing her Chartered Life Underwriter designation.

Supporting charities is another personal passion. Angie says many entrepreneurs have the same desire to give back to the community and that’s another area where her expertise comes into play. “I can discuss various planned giving strategies that would allow entrepreneurs to create a legacy. You can have a tremendous impact.”

To contact Angie Wittmann, Certified Financial Planner® with Desjardins Financial Security Investments Inc., call (204) 925-7420 ext. 7416 or email awittmann@investdfsi.ca ■

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