



Insurance Strategies

Insurance solutions for your life and business

About us

Chevron Wealth Preservation is home to life-licensed advisors who are experts in delivering comprehensive wealth planning. Following an extensive review of your current personal and financial situation, our experienced advisors can provide you with the right solutions to meet your personal and financial goals. Our advisors can design a risk management plan that takes into consideration your retirement, tax and estate planning needs.

Chevron Wealth Preservation is an affiliate of Echelon Wealth Partners and is the national life insurance solutions and services distribution channel providing clients with access to best in class Canadian Life insurance services. Chevron Wealth Preservation currently operates in British Columbia, Alberta, Ontario and Quebec.

When you hear the word “insurance,” what comes to mind first? Being able to replace your car in case of an accident? Repairing damage to your home when a severe storm hits? We consider these things to be valuable enough to insure while often neglecting what is most important: our own lives, the well-being of our family, or the continued success of a business.

From simple to complex, insurance strategies exist that can help you and your family prepare for life’s challenges, and preserve the wealth you have worked so hard to build. A life-licensed advisor at Chevron Wealth Preservation can help you determine the best strategy to help protect what you value most.

Preserve your lifestyle

Whether you are single or married, just entering the workforce or planning for retirement, having a conversation about your personal situation with a trusted advisor at Chevron Wealth Management allows you to explore risk-management options using insurance. An interruption of income — particularly for an extended period — could significantly impact your life and your future. Having adequate insurance coverage can help replace income that is lost as a result of these or other events, at a time when you need it most.

EMPOWER YOUR POSSIBLE

Access to the right products for you

Insurance can make a meaningful difference in your life and in the lives of those who matter most to you. Protecting your financial interests and providing for your loved ones are important actions to take at any stage of your life and career.

Chevron Wealth Preservation and its partners can give you access to the right insurance products for your personal and business circumstances. We have the expertise to assess your insurance needs and recommend the products that best meet those needs.

Our products

We have strategic partnerships with the most reputable and stable insurance companies in Canada. Our insurance platform enables our agents to provide clients with various insurance products and services from well-established Canadian Life insurance companies. The products available through the platform are Term Insurance, Permanent or Whole Life Insurance, Universal Life Insurance, Critical Illness, Disability and Long Term Care Insurance, Annuities and Segregated funds products. In addition to these products and services, we are able to provide business owners with Group Insurance products.

Plan, protect, preserve and enhance

Business succession planning and protection

You have invested a lot of time and effort to establish and grow your business. The business could be at risk if you, a business partner or valuable employee dies or is incapacitated for an extended period. When you have “key person” insurance in place, you can be assured that your business maintains every opportunity possible to continue to grow and thrive, even in the face of a significant issue.

Estate preservation

When you pass away, there will be taxes, liabilities and other costs related to settling your estate. Through a life insurance policy, your beneficiaries will receive tax-free insurance proceeds that can help offset these costs. Since life insurance proceeds are tax-efficient, it means your heirs will receive more from your estate instead of having taxes erode much of its value.

Enhance your income in retirement

If you are looking for a tax-efficient way to boost your income stream in retirement, consider combining a life insurance policy with an annuity. This proven strategy is especially effective in a low interest rate environment, where your net income could exceed that generated by fixed-income products like government bonds and guaranteed investment certificates.

Charitable giving and philanthropy

There are several ways in which you can leave a legacy to your favourite charities or foundations. Insurance offers a tax-conscious way to support your charities of choice while directing more funds to the causes that you care about.

As an experienced life-licensed advisor at Chevron Wealth Preservation, I can assist you in discovering what your insurance needs are. Contact me today to find out how I can help you achieve the peace of mind you deserve.

