Products and Services

Insurance and Investment Portfolio Planning

- Life Insurance
- Disability Insurance
- Critical Illness Insurance
- Long Term Care Insurance
- Individual Health Insurance
- Employee Benefit Plans
- Travel Insurance

Wealth Accumulation and Retirement Income Planning

- RRSP's*
- RESP's*
- RRIF's*
- Annuities
- Non-Registered Investments*
- Estate Planning

* These products offered through Manulife Securities Investments Services Inc.

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Manulife Securities
INVESTMENT SERVICES INC.

BOCKING
FINANCIAL SOLUTIONS INC.

Providing Financial Solutions Today...

And for Generations To Come

Are you 25 - 45 years old?

Peter Bocking

Financial Advisor

Bocking Financial Solutions Inc.

Peter represents the future of Bocking Financial Solutions Inc. as the second generation of the family business. Peter is committed to upholding the values that set his company apart – trust, integrity and personal client care. After spending time as a retail business manager and personal insurance broker, Peter decided to transfer his financial background and relationship-building skills to helping young families plan for their future.

Being part of the market he targets, Peter knows first hand what 25-45 year olds are facing financially:

- Launching a career
- Incurring major debt (car loans, student loans, mortgages, credit cards)
- Getting married
- Buying a home
- Starting a family
- Second mortgages, renovations and other costly projects
- Developing a plan for wealth accumulation

Peter understands that what young people need first is knowledge. Instead of product-based selling, Peter prefers to start with needs first by asking new clients "What is important about money to you?" Answers run the gamut from security, manageable debt, and cash flow to attaining a comfortable future that includes financial independence and travel. Developing a financial plan that matches industry knowledge to individual goals means clients are well-equipped for the road ahead.

In keeping with this philosophy, Peter hosts regular educational seminars open to the public. Participants can learn how to start working towards financial independence in a non-pressured and fun environment. Actively involved in community theatre, Peter's animated and warm personality is appreciated by attendees and clients alike.

If you are between 25 and 45, contact Peter to find out about your financial planning options – knowledge is truly where the power lies in building a secure future.

Managing Your Money

How important are these things to you?

- Providing for your family
- The possessions you own
- Meeting your financial goals
- The wealth you accumulate

If you are like most people, these are high on your priority list. Do you know what the best way is to protect the things most important to you?

By managing your income effectively and protecting your ability to earn that income. Planning ahead is the key to financial stability – and that includes consideration of retirement or unexpected illness. We encourage clients to protect themselves and loved ones by defining goals for all stages of life.

We also provide our clients with:

- Current market updates as it relates to their portfolio with Bocking Financial Solutions Inc.
- Education through optional newsletters and monthly seminars
- Ongoing planning and support through regular reviews of your financial plan

Outstanding client care is paramount to our business - we strive to exceed your expectations.

BOCKING
FINANCIAL SOLUTIONS INC.

Are you over 45 years old?

Neil Bocking, CLU, CH.F.C.

Financial Advisor

Bocking Financial Solutions Inc.

Manulife Securities Investment Services Inc.

Neil has been recommending insurance and investment planning strategies designed to help clients achieve their goals for more than 25 years. Maintaining personalized service for over 700 families has earned Neil a reputation for outstanding client care. Given this level of commitment, Neil counts many multi-generational families among his client base. Neil holds the designations of CLU (Chartered Life Underwriter) and CH.F.C. (Chartered Financial Consultant) making him a Financial Advisor with advanced knowledge in Life & Health Insurance, Employee Benefits, Wealth Accumulation, Retirement Planning, and Wealth Preservation.

Specializing in clients that are near the same life stage as him, Neil knows that men and women over age 45 are looking forward to the new found financial freedom of being debt free, and focusing on the Retirement and Estate Planning phases of their lives.

Key considerations are:

- Final stages of paying down mortgages and post-secondary expenses for children
- Final push to accumulate investment assets for use in retirement
- Transitioning from employment income to retirement income
- Adjusting level of risk in investment portfolios based on lifestyle
- Assessing long term health and insurance needs
- Estate planning: minimizing taxation and maximizing legacies for children, grandchildren, and charitable donations

Families at this point in life need a trusted advisor to help navigate a shift in financial strategy. Someone that understands their unique needs and the importance of developing a customized solution.

If you are over 45 years old, contact Neil to learn more about what options will serve you now and throughout your retirement.

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