Everything Starts With Your Needs

CEDARSHORE
WEALTH MANAGEMENT

At CedarShore, we meet the financial needs of individuals and families who live outside of major metropolitan areas.

Why? Because we've been investing in Canadian communities since 1984 and know that your approach to life, work and money is different.

Personal financial services built around your priorities

You want clarity regarding how to reach your financial goals. We help you chart a path to achieving them with trusted advice.

- Financial planning
- Retirement planning
- Investment planning

It's not just about a change of pace – we know it's a change in lifestyle.

Capital preservation with a reasonable return

We prioritize steady, long-term growth over the aggressive pursuit of higher returns. With this investment philosophy, we strive to help you preserve your capital while achieving a reasonable return.

We are committed to providing objective advice that is in your best interest. That's why our process is driven by your needs.

1. Learning About You
2. Establishing Your Goals & Objectives
3. Understanding Your Current Financial Situation
4. Developing & Presenting Your Financial Plan
5. Implementing Your Plan
6. Monitoring Your Plan

Interested in financial advice that matches your lifestyle and small-town values?

Contact us to start a conversation.

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Competency. Consistency. Care.®

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