

In His Service

FINANCIAL SERVICES

DAVID BLAKELY

Life Insurance & Investment Agent/Broker



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Protecting your future
with faith and
financial wisdom.

About Me



In 1992, I began my career as a Provincially Licensed R.E.S.P. Agent. Since 2000, I have been a Provincially Licensed Life Insurance Agent & Broker offering life insurance and investment services.



I help people pre-plan for the financial events most likely to occur in their lives. As a Christian, I strive to provide the highest standard of service, following the guidance of Colossians 3:23:
"And whatsoever ye do, do it heartily, as to the Lord..."



I am contracted with several life insurance companies in Canada, offering financial services through different Canadian providers. My commitment is to each person the Lord places in my care.



I am a servant both of the Lord Jesus Christ and the clients I serve. Jesus was a servant, as well as our Saviour and Lord. I seek daily to follow His example in my work.



My business, named "In His Service - Financial Services", is a reflection of this mission. Ultimately, it is His business, and I am privileged to manage it in His name.

I continue to **help, educate, and protect** people from all types of financial ruin caused by lack of financial planning & lack of education.

My mission is to guide you through your financial journey with **integrity, transparency, and compassion.**

My Mission

Companies I am contracted with on your behalf...

- Assumption Life
- B.M.O.
- Canada Life Assurance
- Canada Protection Plan
- Foresters Life Insurance Canada
- Desjardins Financial
- Empire Life
- Equitable Life Insurance
- Green Shield Canada - (Benecaid)
- Humania Assurance
- Hunter McCorquodale
- Ivari (formerly Transamerica Life of Canada),
- Industrial Alliance Insurance and Financial Services
- ManuLife Financial
- Medavie Blue Cross
- MyDignity - (Home Care Assistance)
- UW by UV Insurance
- R.B.C.
- The Edge Benefits
- Wawanesa Life
- Tour + Med Travel & TUGO
(both companies specializing in travel coverage)

**Did you know
the following
are CRA tax
deductions?**

Home Care
Assistance
Plans

Health &
Dental Plans

Life Insurance
as a Charitable
Policy

First Home
Savings
Account

Registered
Retirement
Savings Plans

Insurance Services

1. Home Care Assistance Plan Coverage

- Receive the care you need, short or long term, while staying in the comfort of your own home.
- This plan supports you when you're unable to care for yourself, ensuring that you maintain your independence with dignity and peace of mind.

2. Health and Dental Plans – Individual & Group

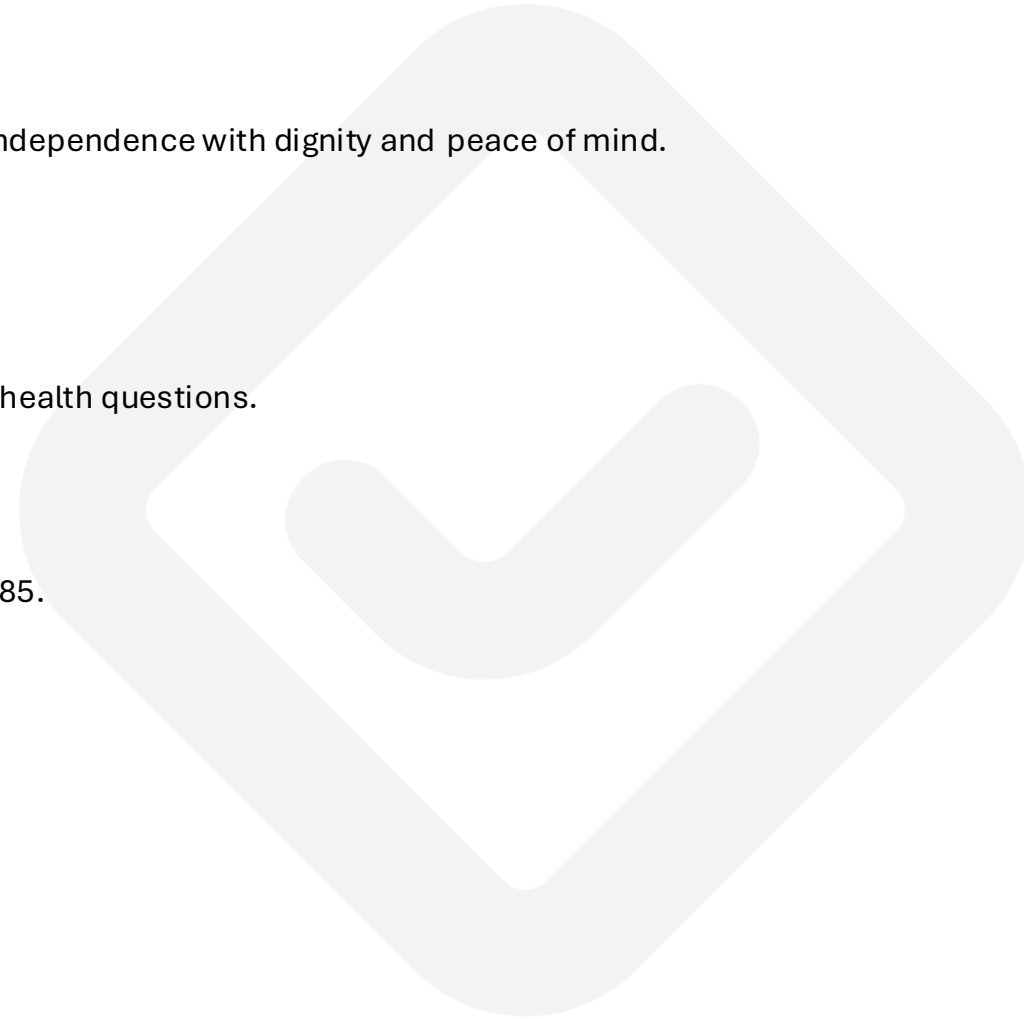
- No medical or health questions to answer.
- Guaranteed acceptance.
- If your company lacks Group Health & Dental Coverage, we can provide it for you. No medical or health questions.
- If you are leaving your Group Health & Dental Coverage, you're eligible for our individual plans.

3. Simplified Issued Final Expense Coverage

- Designed to cover end-of-life obligations and expenses. Plans available for individuals aged 0 to 85.
- Obtain peace of mind to your family with simple and easy approval.
- Regular life and mortgage coverage available as well.

4. Cancer Coverage with a 15% Life Insurance Benefit

- Receive up to \$75,000 in cancer coverage, with a 15% life insurance benefit included.
- This plan is available from 15 days old to age 80.
- Only a few simple questions to answer to qualify.



Insurance Services Continued

5. Critical Illness Coverage

- Be prepared for the unexpected.
- Our critical illness coverage helps you financially if you develop a life-altering illness.
- Offering financial support when it's needed most.

6. Disability – Accident and Illness Coverage

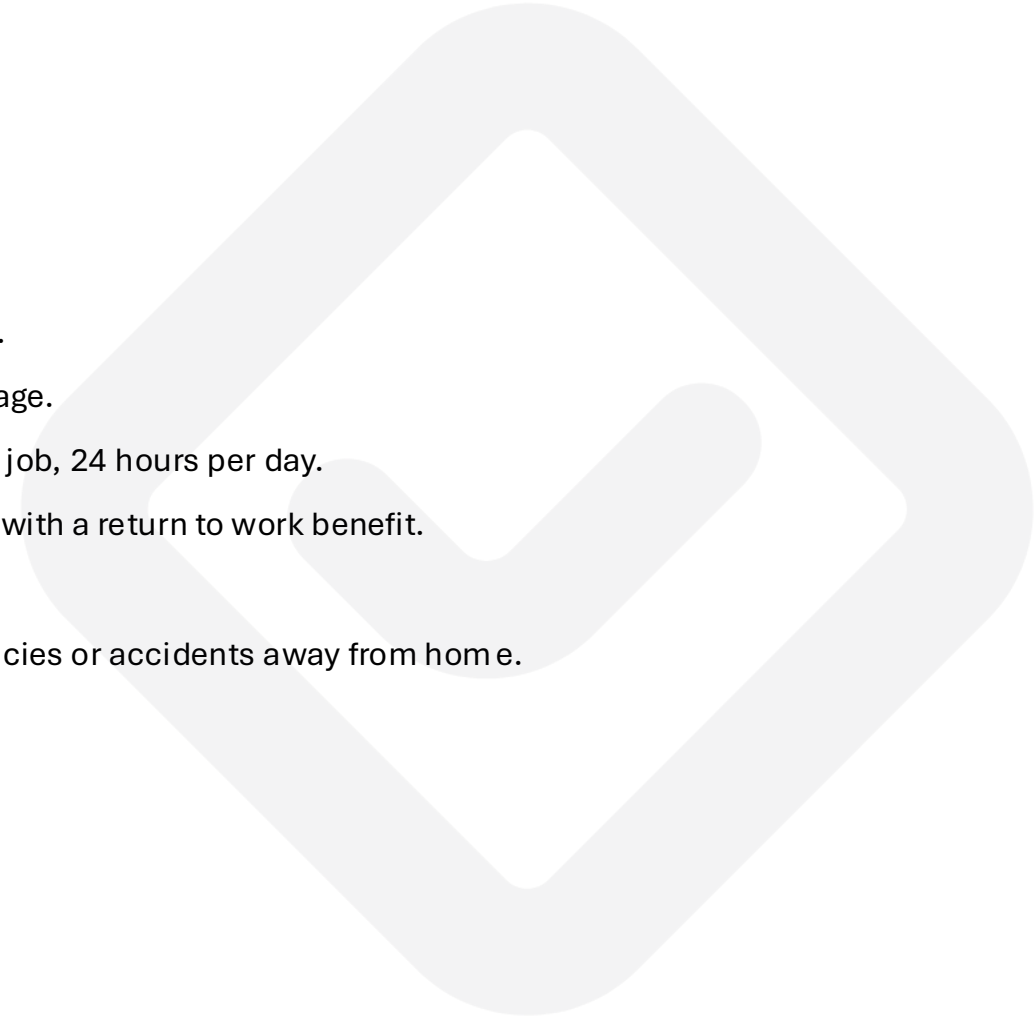
- Are you dependant on your work income? If so, you probably need accident and illness coverage.
- Protecting your income in case of an accident or illness with our comprehensive disability coverage.
- Receive your coverage that will pay you from day 1 with no waiting period including on or off your job, 24 hours per day.
- Provides you with financial stability when you're unable to work plus your coverage provides you with a return to work benefit.

7. Travel Coverage

- Enjoy peace of mind while traveling, knowing that you're covered for unexpected health emergencies or accidents away from home.

8. Other Services Available

- Mortgage referrals.



Investment Services

1. Registered Retirement Savings Plans (RRSPs)

- Save for retirement. Tax-deferred contributions and growth.
- RRSPs allow you to invest for the future while reducing your taxable income today, providing a powerful tool for long-term financial security.

2. Group RRSPs and Pension Benefit Plans

- Employers can offer group RRSPs and pension plans to help employees save for retirement.
- These plans provide: tax advantages ease of payroll deductions potential employer contributions for a more robust retirement

3. Registered Retirement Income Funds (RRIFs)

- Convert your RRSP savings into a steady income stream in retirement.
- RRIFs allow you to withdraw funds while continuing to grow your investments, ensuring you have the financial resources you need throughout retirement.

4. Annuities (Guaranteed Income For Life)

- Secure a lifetime income with annuities.
- By investing a lump sum, RRSP, or RRIF, you receive guaranteed regular payments for life, ensuring financial stability throughout your retirement years.

5. Guaranteed Investments

- Protect your savings with guaranteed investment options.
- These investments offer a secure way to grow your wealth, ensuring that your principal is protected while still earning returns year after year.
- Perfect for risk-averse investors seeking stable growth.

Investment Services Continued

6. First Home Savings Account (FHSAs)

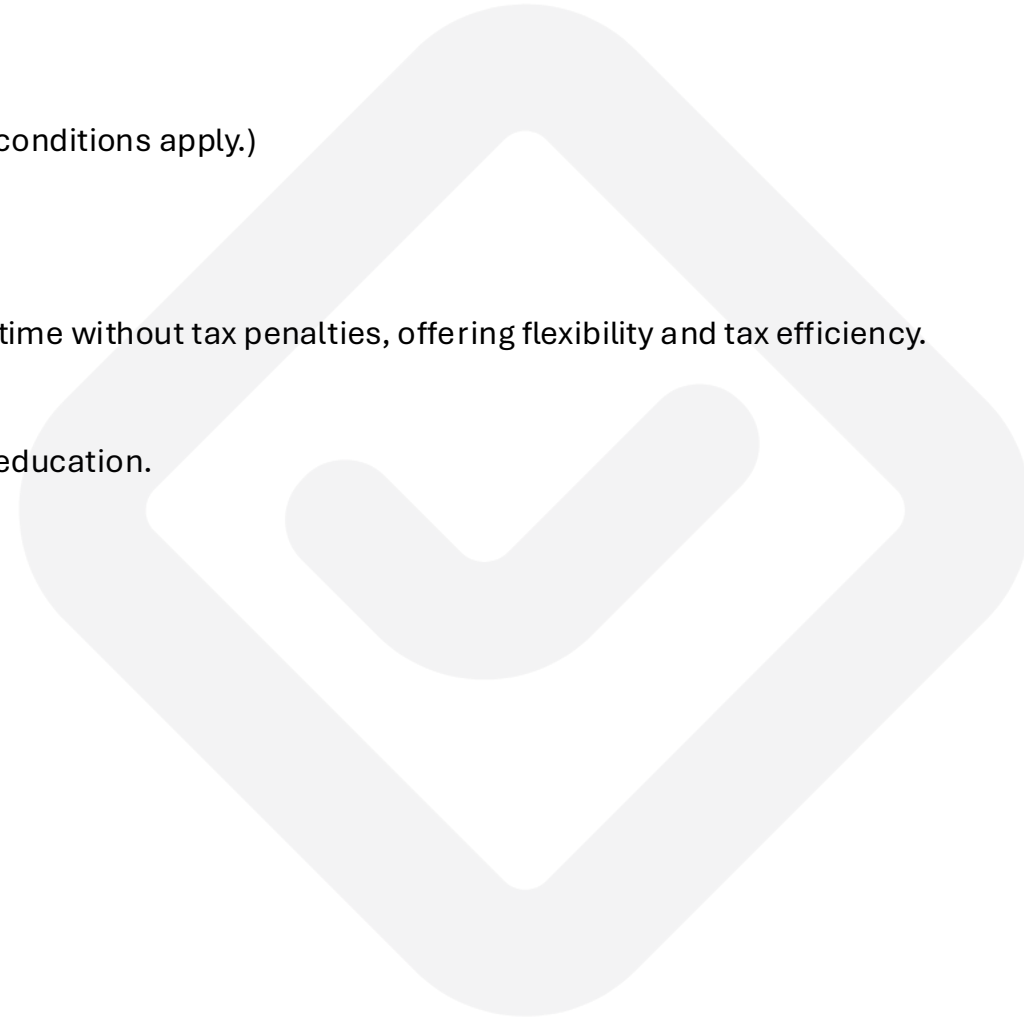
- A special savings plan designed to help buyers save for their dream home.
- Contributions are tax-deductible. Withdrawals for the purchase of a home are tax-free. (Certain conditions apply.)

7. Tax-Free Savings Plans (TFSAs)

- Grow your savings tax-free with a TFSA.
- Whether you're saving for a short-term or long-term goal, TFSAs allow you to withdraw funds anytime without tax penalties, offering flexibility and tax efficiency.

8. Registered Education Savings Plans (RESPs)

- Invest in your child's future education with a RESP, which allows you to save for post-secondary education.
- Benefit from: government grants tax-sheltered growth.
- It's a smart way to ensure your children's educational expenses are covered.



Please let me know how I can serve you!

THANK YOU!

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