

JS HARRIS FINANCIAL Inc.

Insurance Strategies for Personal & Corporate Succession Planning

Jeremy Harris, B.A (Econ.)



My goal is to assist clients with their insurance needs and planning. Together with you, we can strategize the insurance solutions to ensure your estate is preserved tax efficiently.

Our team of professionals will address your concerns and offer solutions to your personal, corporate, and estate protection needs. We will listen and evaluate your concerns through a needs analysis process. From there, we will carefully craft your insurance plan to fulfill your goals both short & long term, and evaluate as needs change.

Background:

- Bachelor of Arts (Economics) - UVIC 1998
- Life Insurance Level 1 (2000) & Level 2 (2001), licensed in BC & Alberta
- 8 yrs of insurance planning and providing solutions
- Member of the Rotary Club of Kelowna (Downtown)

Services:

- Life Insurance
- Mortgage & Debt Insurance Coverage—Term Life 10 & 20
- Livings Benefits - Critical Illness, Disability, Long Term Care
- Corporate—Buy/Sell Funding & Tax Shelter Strategies
- Estate Preservation and Succession Planning
- Group Benefit Plans

What you can count on:

- Independent advice
- Trust & Confidentiality

JS HARRIS FINANCIAL Inc.

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