



We are so pleased to announce a strategic partnership between Capesky Insurance and Wealth Management Inc. and The Callery Group.



On Monday April 15, 2024,

The Capesky Team moves *just 10 Minutes north* to [381 Taunton Rd East, Oshawa, L1G 0E1](#) to join ***The Callery Group.***

Should you have any questions or concerns please reach out to us at the same old #'s

- 905-571-7644
- Toll-Free at 1-800-646-1125
- www.capesky.ca

This strategic partnership provides immediate “bench strength” to your service team; giving our **clients the comfort of knowing that the advice and service you value, will be here for years to come.** We proudly share client-focused mission statements, core-values and service standards with these colleagues and are pleased to partner together to support your financial growth and security.

Rest assured, there are no immediate changes to your relationship with us, and there is nothing that you have to do today. We are only writing to tell you that you will see friendly new faces around our offices when you visit and we hope you’ll be as excited as we are to welcome them to your trusted financial advisory team.

The addition of talented Advisors and administrative leadership to our roster is a client-focused decision that is designed to offer all our valued relationships more of what they have come to expect from an already dedicated team. ***We are adding decades of industry experience and passion for service to your client experience with this announcement.*** Together, our firms will be able to better specialize to your unique needs, bring the right expert advice to your situation and deliver effective solutions more efficiently than ever.

Our Mission:

We are committed to provide our clients with **honest financial advice, tailored to their own future goals** and aligned to their current priorities.

Our Vision:

Careful planning today will ensure a fulfilling comfortable retirement. Arranging the right programmes will bring peace of mind which allows you to better enjoyment starting today! The right programme minimizes the taxes on Capital Gains and maintains liquidity in your Estate and **avoids financial hardship for your surviving loved ones.**

Our Values:

- Respect
- Integrity
- Honesty
- Accountability
- Responsibility
- Perseverance

