

## ARE YOU READY TO INVEST IN THE 21<sup>st</sup> CENTURY?

Zavitz Insurance is expanding its own portfolio to help you do more. By partnering with dedicated financial and investing experts, Zavitz can help you get solid guidance and truly independent advice. Gain powerful insight from a team that embraces the changing financial landscape while relying on the traditional wisdom that got us here.



Get financial guidance through your friends at Zavitz. We have decades of experience building insurance portfolios of all types and sizes that are tailored to your individual needs. Now we extend that same approach to your full financial picture by connecting you with the investment and retirement expertise your portfolio demands.

### BENEFIT FROM STRONG PARTNERSHIPS

By collaborating with other specialists in the financial field, Zavitz provides a higher level of service. Partnering with an array of expertise that compliments our own, we have options available to suit your unique needs. An alliance with WealthSimple, for instance, has allowed us to provide a low-cost investment alternative when needed. Have your own alliances? We collaborate with them too.

### HELPING YOU NAVIGATE A CHANGING FINANCIAL LANDSCAPE

For nearly 35 years, the team at Zavitz Insurance has been providing diverse and innovative solutions for our clients – with guidance you can understand and tradition you can count on.

Now Zavitz is bringing a holistic approach to your financial management, combining retirement and estate planning, investment services and insurance, all on one page.

It's a simplified way of managing all your interests using flexible, independent advisors with a reputation you can count on. As partners in practice, business and life, Zavitz is with you every step of the way.

At Zavitz, we have embraced the inevitable changes necessitated in the information age, and have prepared and staffed to meet those challenges. Though marketplaces and interests may shift, the standards and sensibilities applied by the professionals at Zavitz remain firmly rooted in traditional wisdom and unflappable dedication to the client.

**Zavitz: Guidance you can understand, tradition you can count on.**

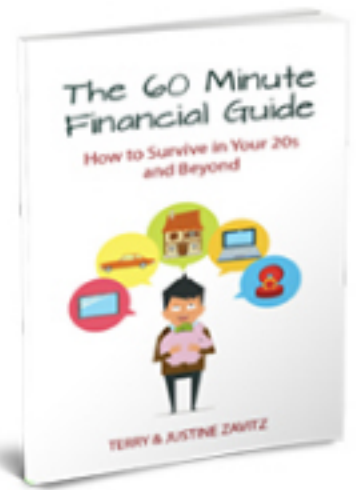


## A new dawn in financial services...

From investments to insurance, your portfolio deserves closer attention. See why more tech-savvy investors rely on Zavits for complete portfolio management. Rely on a team that embraces the changing financial landscape while maintaining the traditional wisdom and values your investments deserve.

### Get Some Free Financial Expertise Right On Your Phone

From investments to insurance, your portfolio deserves closer attention. See why more tech-savvy investors rely on Zavits for complete portfolio management. Rely on a team that embraces the changing financial landscape while maintaining the traditional wisdom and values your investments deserve.



### FINANCIAL EXPERTISE, RIGHT ON YOUR PHONE:

Visit the Zavits website for a free copy of The 60 Minute Financial Guide by Terry & Justine Zavitz. It offers a quick and easy read designed to help people in their 20s and 30s (and beyond) avoid common financial pitfalls.

### WHO WE ARE...

For nearly 35 years, the team at Zavitz Insurance has been providing diverse and innovative solutions for our clients – with guidance you can understand and tradition you can count on.

Now Zavitz is bringing a holistic approach to financial management, combining retirement and estate planning, investment services and insurance, all under one roof.

It's a simplified way of managing all your interests from flexible, independent advisors with a reputation you can count on. As partners in practice, business and life, Zavitz is with you every step of the way.

### Zavitz: With You At Every Step.

#### GROUP SOLUTIONS

Many of our clients have long benefited from Zavitz's group solutions. Insurance covers so much more than life, health and property. Insight comes from knowing the needs of our clients and those who depend on them. Get the benefits you need on the terms you want.



*IDENTIFYING QUALITY IS NOT COMPLICATED...*

## REPUTATION AND LONGEVITY...

Everything we do at Zavitz demonstrates how we're a different kind of operation. Known for staffing-up well beyond industry standards to provide our clients with a dedicated, responsive team, Zavitz brings unparalleled attention to detail. It's why so many of our earliest clients are still with us today, over three decades later.



## INVESTMENTS, INSURANCE, PLANNING

Solid financial guidance comes from years of experience on the playing field. Trust a firm that's not afraid to evolve alongside technology and innovation, while honoring the traditional values that made them a success for over three decades...

- \* **DEDICATED EXPERIENCE**
- \* **HANDS-ON ATTENTION**
- \* **INDEPENDENT GUIDANCE**

Let Zavitz connect you with choice financial advisors with whom we've built strong alliances and mutual professional respect, or if you already have a team of advisors, let us connect with them. There's a better way to plan for tomorrow.

## A HOLISTIC APPROACH TO FINANCIAL MANAGEMENT...

For nearly 35 years, the team at Zavitz Insurance has been providing diverse and innovative solutions for our clients - with guidance you can understand and tradition you can count on.

Now Zavitz is bringing a holistic approach to financial management, combining retirement and estate planning, investment services and insurance, all under one roof.

It's a simplified way of managing all your interests from flexible, independent advisors with a reputation you can count on. As partners in practice, business and life, Zavitz is with you every step of the way.

At Zavitz, we have embraced the inevitable changes necessitated in the information age, and have prepared and staffed to meet those challenges. Though marketplaces and interests may shift, the standards and sensibilities applied by the professionals at Zavitz remain firmly rooted in traditional wisdom and unflappable dedication to the client.

## HELPING YOU NAVIGATE A CHANGING FINANCIAL LANDSCAPE.



1.888.347.2437

info@zavitzinsurance.com



## FINANCIAL PLANNING FOR EVOLVING MARKETPLACES...

*Get investment guidance and securities analysis from professionals who understand the full financial landscape. At Zavitz, we have embraced the inevitable changes necessitated in the information age, and have prepared and staffed to meet those challenges.*

*Though marketplaces and interests may shift, the standards and sensibilities applied by the professionals at Zavitz remain firmly rooted in traditional wisdom and unflappable dedication to the client.*



## COMPREHENSIVE EXPERTISE BY ZAVITZ...

- COMPLETE INVESTMENT GUIDANCE
- FULL INSURANCE SERVICES
- RETIREMENT PLANNING
- INDEPENDENT ANALYSIS
- LIVING BENEFITS, MEDICAL INSURANCE

*Never before has traditional wisdom been so valuable. Step off the sidelines and invest in the 21st Century with the expertise your investment deserves. Give your portfolio the spa treatment. Insurance and Investments - all on one page.*

## WHO WE ARE...

For nearly 35 years, the team at Zavitz Insurance has been providing diverse and innovative solutions for our clients - with guidance you can understand and tradition you can count on.

Now Zavitz is bringing a holistic approach to portfolio management, combining retirement and estate planning, investment services and insurance, all from a single provider.

It's a simplified way of managing all your interests from flexible, independent advisors with a reputation you can count on. As partners in practice, business and life, Zavitz is there with you every step of the way.

While expanding our own portfolio, we remain committed as insurance specialists, offering comprehensive solutions and guidance. From life and property insurance to living benefits and retirement planning, Zavitz is there with you every step of the way.

439



## NAVIGATING TODAY'S MARKET WITH YESTERDAY'S VALUES.

*Is your portfolio working in-tandem, with investment and insurance strategies built together? Zavitz fuses modern trading innovations with traditional wisdom to bring you complete coverage and services, all from one shop.*

*At Zavitz, we specialize in facilitating solutions, progressing and protecting financial wellbeing every step of the way.*



## A DIFFERENT KIND OF SHOP...

*Everything we do at Zavitz demonstrates how we're a different kind of operation. As investment advisors, we staff-up well beyond industry standards to provide clients with a dedicated, responsive team unparalleled attention to detail. It's why so many of our earliest clients are still with us, over three decades later.*

- \* **DEDICATED EXPERIENCE**
- \* **HANDS-ON ATTENTION**
- \* **INDEPENDENT GUIDANCE**

## WHO WE ARE...

For nearly 35 years, the team at Zavitz Insurance has been providing diverse and innovative solutions for our clients - with guidance you can understand and tradition you can count on.

Now Zavitz is bringing a holistic approach to portfolio management, combining retirement and estate planning, investment services and insurance, all from a single provider.

It's a simplified way of managing all your interests from flexible, independent advisors with a reputation you can count on. As partners in practice, business and life, Zavitz is there with you every step of the way.

*At Zavitz, we have embraced the inevitable changes necessitated in the information age, and have prepared and staffed to meet those challenges. Though marketplaces and interests may shift, the standards and sensibilities applied by the professionals at Zavitz remain firmly rooted in traditional wisdom and unflappable dedication to the client.*

**ZAVITZ: MANAGING MORE THAN MONEY.**



**1.888.347.2437**

**info@zavitzinsurance.com**

## FROM INVESTMENTS TO INSURANCE... YOUR PORTFOLIO DESERVES CLOSER ATTENTION.

Smart investors know diversifying doesn't have to mean managing a rolodex of contacts - and that there's value in keeping things simplified. See why more tech-savvy investors rely on Zavitz for complete portfolio management.

Zavitz maintains a long and respected reputation for independent and honest analysis. Our Flexible Planning Approach brings a collaborative and coordinated effort (accountants, lawyers, financial advisors) that is ready for versatile implementation. Working with all carriers means Zavitz brings truly independent analysis based fully on the client's considerations.



Never before has traditional wisdom been so valuable. Traditional wisdom balanced with forward thinking insight is The Zavitz Difference. Trust a firm that's not afraid to evolve alongside technology and innovation, while honoring the traditional values that made them a success for over three decades.

### WHO WE ARE...

For nearly 35 years, the team at Zavitz Insurance has been providing diverse and innovative solutions for our clients - with guidance you can understand and tradition you can count on.

Now Zavitz is bringing a holistic approach to portfolio management, combining retirement and estate planning, investment services and insurance, all from a single provider.

It's a simplified way of managing all your interests from flexible, independent advisors with a reputation you can count on. As partners in practice, business and life, Zavitz is there with you every step of the way.

At Zavitz, we have embraced the inevitable changes necessitated in the information age, and have prepared and staffed to meet those challenges. Though marketplaces and interests may shift, the standards and sensibilities applied by the professionals at Zavitz remain firmly rooted in traditional wisdom and unflappable dedication to the client.

**INSURANCE. INVESTMENT. IN CONCERT.  
GET EVERYTHING ON THE SAME PAGE.**



1.888.347.2437

[info@zavitzinsurance.com](mailto:info@zavitzinsurance.com)

## IT'S TIME TO INVEST IN THE 21st CENTURY?

*Zavitz Insurance is expanding our own portfolio to now include full financial and investing services. Get solid guidance and truly independent insight from a team that embraces the changing financial landscape while relying on the traditional wisdom that got us here.*

*At Zavitz, we specialize in facilitating solutions, progressing and protecting financial wellbeing every step of the way.*

### COMPREHENSIVE EXPERTISE BY ZAVITZ...

- COMPLETE INVESTMENT GUIDANCE
- FULL INSURANCE SERVICES
- RETIREMENT PLANNING
- INDEPENDENT ANALYSIS
- LIVING BENEFITS, MEDICAL INSURANCE



### INVESTMENTS & INSURANCE - WORKING IN TANDUM

Smart investors know diversifying doesn't have to mean managing a rolodex of contacts - and that there's value in keeping things simplified. Get investment guidance and securities analysis from professionals who understand the full financial landscape. Is your portfolio working in-tandem, with investment and insurance strategies built to work together?

### THE ZAVITZ DIFFERENCE

Traditional wisdom balanced with forward thinking - that's The Zavitz Difference. Trust a firm that's not afraid to evolve alongside technology and innovation, while honoring the traditional values that made them a success for over three decades.

### WHO WE ARE...

For nearly 35 years, the team at Zavitz Insurance has been providing diverse and innovative solutions for our clients - with guidance you can understand and tradition you can count on.

Now Zavitz is bringing a holistic approach to portfolio management, combining retirement and estate planning, investment services and insurance, all from a single provider.

It's a simplified way of managing all your interests from flexible, independent advisors with a reputation you can count on. As partners in practice, business and life, Zavitz is there with you every step of the way.

### Is your financial strategy forward-thinking?



1.888.347.2437

info@zavitzinsurance.com

## See how the digital age has transformed financial services as we know it.

Identifying quality is not complicated... begin by confirming reputation longevity. For 35 years, the professionals at Zavitz have been providing clients with solid guidance and truly independent insurance analysis.

Now we expand our services to include comprehensive financial guidance, including investment management and retirement planning. Learn how we can help you get the most from your portfolio.



### COMPREHENSIVE EXPERTISE BY ZAVITZ...

*Zavitz: fusing modern financial innovations with traditional wisdom.*

#### STRONG PARTNERSHIPS

By collaborating with other specialists in the financial field, Zavitz provides a higher level of service. Partnering with an array of expertise that compliments our own, we have options available to suit your unique needs. An alliance with WealthSimple, for instance, has allowed us to provide a low-cost investment alternative when needed. Have your own alliances? We collaborate with them too.

#### A GIFT FOR CLIENTS

Visit the Zavitz website for a free copy of The 60 Minute Financial Guide by Terry Justine Zavitz. It offers a quick and easy read designed to help people in their 20s and 30s (and beyond) avoid common financial pitfalls.

#### WHO WE ARE...

For nearly 35 years, the team at Zavitz Insurance has been providing diverse and innovative solutions for our clients - with guidance you can understand and tradition you can count on.

Now Zavitz is bringing a holistic approach to financial management, combining retirement and estate planning, and investment oversight, all from a single provider.

It's a simplified way of managing all your interests from flexible, independent advisors with a reputation you can count on. As partners in practice, business and life, Zavitz is with you every step of the way.

**Helping you navigate a changing financial landscape.**



**1.888.347.2437**

**info@zavitzinsurance.com**