

MANAGE RISK

MINIMIZE TAXES

ENHANCE INCOME

CARE FOR YOUR HEALTH

CREATE A LEGACY

Mailey Rogers Group

Team of Experts - Insurance Strategies

Gary Barker, CLU, CFP, Senior Advisor | Jamie Wilson, Advisor

Background and Experience

Gary has a wide range of business experience, both within and outside the financial services industry. Over the last 17 years Gary has held advisory and management positions within various industries including both the investment and insurance industries. Before joining ScotiaMcLeod, his most recent experience included working for one of the major life insurance companies in Canada as the Executive Account Manager for British Columbia.

Jamie joined ScotiaMcLeod in 2003, but began working in the financial services industry in 2001, including two years' experience as an independent advisor at a major financial services firm. He has his life license and is working towards his CFP.



Business Approach

As part of the Mailey Rogers Group's team of wealth experts, we offer complete insurance expertise to help you reach your financial objectives. We provide a wealth of knowledge, experience and insight to deliver a variety of solutions that meet your needs and goals, including wealth creation, enhancement, and preservation; income creation and replacement; tax minimization and tax efficient asset accumulation and distribution; business coverage and succession planning; charitable giving and more. We offer professional, objective advice and explore all available insurance strategies to assist in developing your financial plan.

Services Provided

Working with you and the Mailey Rogers Group, we thoroughly evaluate your needs and identify any gaps in protection coverage. We perform a complete analysis of your objectives and audit your current coverage to develop strategic insurance-based solutions to meet your short-term and long-term goals, and demonstrate how these solutions can enhance your overall financial strategy. With a complete understanding of the available products in the marketplace and access to the most technically advanced expertise within the insurance industry, we provide illustrations, explanations, and any other information required to ensure your complete satisfaction with solutions and service throughout the entire process.



Mailey Rogers Group

PERSONAL WEALTH MANAGEMENT

MAILEYROGERS.COM

All insurance products are sold through ScotiaMcLeod Financial Services Inc., the insurance subsidiary of Scotia Capital Inc., a member of the Scotiabank Group. When discussing life insurance products, ScotiaMcLeod advisors are acting as Life Underwriters (Financial Security Advisors in Quebec) representing ScotiaMcLeod Financial Services Inc.

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