HollisWealth® Flagstone FINANCIAL GROUP

5 THINGS TO KNOW FOR

JANUARY 2021

1 $6,000 TFSA Contribution Limit for 2021

With the TFSA limit at $6,000 again this year, the total room available in 2021 for someone who has never contributed and has been eligible for the TFSA since its introduction in 2009 is $75,500.

Did you know that tax-free savings accounts (TFSAs) are designed to help Canadians save more by allowing you to hold a wide range of investments including GICs, bonds, stocks and mutual funds?

Are you making the best investment choices for your TFSA accounts? Call us anytime at 519-245-7778 to discuss your options.

Source: https://www.canada.ca/en/revenue-agency/services/tax/registered-plans-administrators/pspa/mp-rrsp-dpsp-tfsa-limits-ympe.html

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2 Webinar with Philip Petursson, Chief Investment Strategiest & Head of Capital Markets Research for Manulife Financial

Manulife Investment Management

We would like to **invite you to participate in a ZOOM webinar** where we will be hosting *Philip Petursson, Chief Investment Strategist and Head of Capital Markets Research* on **Wednesday, January 13 2021 at 1:00 pm**.

Philip will take a few minutes to reflect on the highlights affecting capital markets during 2020 and provide his insights for the year ahead.   To have the chance to listen to a speaker of this caliber is truly a unique opportunity that we are so pleased to provide to you.

Philip contributes to many publications for Manulife, he is often quoted in newspapers, appears as a guest speaker at numerous conferences and has been seen on television on BNN where he is invited to share his expertise on economic issues. *In our office, we take every opportunity we can to listen to him speak.*

Phillip will talk about the markets for 10-15 minutes followed by a Question and Answer session for 15-20 minutes. ***If you have a question that you would like to submit, please send them to us ahead of the event and we will try to ask Philip as many as we can during our webinar***.

Philip has a unique ability to present complex concepts in an easy to understand manner. Don't miss this opportunity to hear from one of Canada's most sought after speakers!

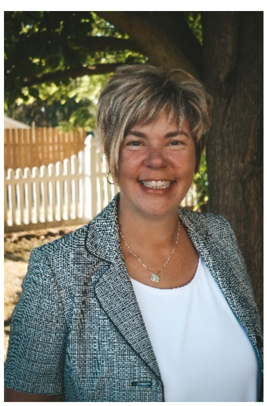
To join this webinar, you will need to click the link below 10 minutes before the presentation starts.

You can join the video webinar either using your computer or your smart phone

Zoom Webinar Link: https://manulife-johnhancock.zoom.us/j/99045051792
Password: 469852

Zoom Phone Call In: US: +1 877 853 5257 (Toll Free)
Canada: +1 855 703 8985 (Toll Free)
Webinar ID: 990 4505 1792
Password: 469852

Congratulations Lori On Completing Your LLQP Exam



Join us in congratulating Lori for her successful completion of the LLQP (Life License Qualification Program) exam! She is now waiting for registration with our insurance Managing General Agent (MGA) – PPI, Hollis Insurance.

Successful completion of the LLQP program and sponsorship of the license through an insurance provider, enables an individual to sell life insurance as well as disability, critical illness and long term care insurance products. Segregated Investment fund offerings also fall under the LLQP.

Way to go Lori!

Introducing our new name – IA Private Wealth

We are excited to finally share the ***RE-BRANDING*** of Holliswealth & IA Securities and introduce to you our new dealership name – **IA Private Wealth**.

Ever since HollisWealth was purchased by Industrial Alliance in August 2017, we knew there was a name change on the horizon. IA Private Wealth better reflects our business focus as we help investors growth their wealth and achieve their goals for their future.

In the coming months, you will notice our interior and exterior signage being updated to our new dealership name. IA Private Wealth will be branded on your statements, online investment portal, income tax slips and payee information for your online contributions to your investment accounts. You will also make your investment cheques payable to IA Private Wealth beginning in early 2021.

When accessing your online investment portal after January 18 2021, you will access it by going to https://www.iaprivatewealth.ca

We will continue to use our trade name – Flagstone Financial Group – as that is a name that is owned by Brenda Meulendyks and Lori Van Geffen.

It is important to know that investors will not be required to sign any updated documentation as this is a re-branding initiative only.

As always, our entire team is here to help you in any way we can, so reach out to us with your questions any time.

Sincere Thank You For Supporting Our VON Initiative

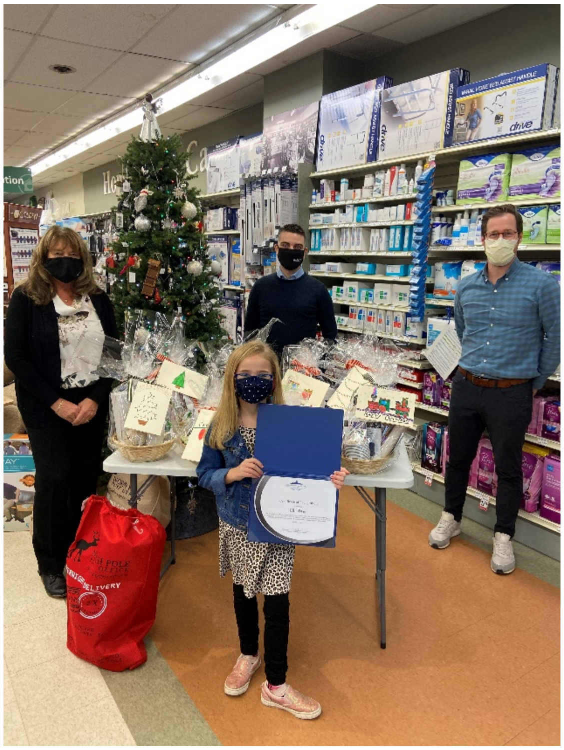
On November 23rd we launched our second "Secret Santa For Seniors". We worked in coordination with the VON and Bossons Pharmacy to provide gift baskets to our community seniors who are often overlooked during the Christmas season.

We are thrilled and beyond grateful to say that just over ONE HUNDRED baskets were purchased this year. A special note and thank you goes out to Ellie Dyer who is a 9 year old girl in our community who raised money all on her own to purchase 27 baskets for this program.

Ellie was then recognized and awarded the Community Service Award by our mayor, Joanne Vanderheyden. This is the true meaning of giving at Christmas. Way to go Ellie!

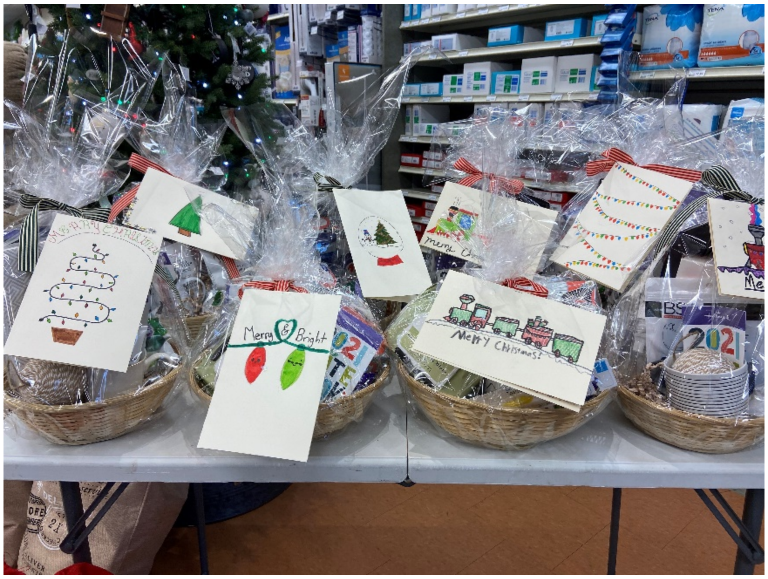
Christmas cards were also created at one of our local schools and tucked in with the gift baskets. The heartwarming messages from our youngsters to our seniors would bring a tear to the eye of the recipients this year.

On Friday, December 11th, Joel in our office helped VON make the deliveries and was overwhelmed with the kind words of thanks at each and every delivery location.



Thank you to all our clients and friends that donated to the VON Secret Santa program. Thank you to the team at VON for helping us to coordinate the names and deliveries of the packages and an extra special thank you to Alisha and Mike Gleiser, owners of Bossons Pharmacy for creating the baskets and keeping them safely stored away until they could be delivered.

We live in a truly amazing community.



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