

ENHANCING OUR EXPERTISE FOR INSURANCE



As part of our commitment to providing our Advisor Teams and their clients with the best-in-class solutions and to maintain our leadership position in serving the needs of high net worth investors and entrepreneurs, we have enhanced our Insurance Services.

We are pleased to announce that **Bernie Geiss**, an estate planning specialist, has joined the RGMP Insurance Services Limited in British Columbia as a consultant serving our Vancouver, Sidney and Victoria offices. Our team of professionals has the breadth and depth of expertise to serve the sophisticated needs of our clients. Advisors and clients now have access to regional capabilities allowing for better service and quicker turnaround responding to queries and developing strategies to address insurance and estate planning opportunities.

Bernie Geiss, CLU, TEP, CFP, CHS **RGMP Insurance Services / Cove Financial Group**

Bernie has been working for more than 25 years in the financial and estate planning sector. President and founder of **Cove Financial Planning Ltd.**, he is supported by his administrative team which includes: Luciana Alvarez, Christie Geiss and Karen Smith.

Cove Financial Planning has two other important strategic alliances. It is a key Associate of **PPI Advisory** and **PPI Solutions** for product distribution and high end advice. It also provides group benefits and pension services to business owners through **Davis Benefits & Pensions**.

Bernie has earned the following designations:

- Chartered Life Underwriter (CLU)
- Certified Financial Planner (CFP)
- Trust & Estate Practitioner (TEP)
- Certified Health Insurance Specialist (CHS)

He is active in several professional organizations involved in estate planning. He lives in North Vancouver with his wife Christie and their 3 children.

André L'Espérance, LL.L.

Director

Wealth & Estate Planning
514.288.2626

andre.lesperance@richardsongmp.com