



Ideal Life Experience Ltd. - Canada

Financial Advisory Firm of the Year 2023 - Calgary

What is Ideal Life Experience Ltd. and what does it do?

We are specialists in the financial services industry. We help people who are struggling with a significant financial issue. It could be an inheritance, financial independence, changing advisers, post-secondary funding, divorce, purchase or sale of a home, purchase or sale of a business, retirement rollover/severance, discovery of excessive fees, couples not agreeing about financial issues, the ability to retire or any other financial issue that keeps you up at night.

We are also Calgary's only FLAT FEE for advice fiduciary.

What sets you apart from other financial planning companies?

We are a fiduciary for our clients. That means we have a legal duty to put their interests ahead of our own. We have a duty to avoid conflicts of interest between ourselves and principals and cannot profit from our relationship with a principal without their express consent. (To be clear Financial Advisors in Canada are held to a "*suitability standard*" that does NOT require them to

act in the best interests of the client) We simplify our client's lives and hold them accountable to achieve what is most important to them.

My clients are successful people who want more time for the things in life that they can't delegate, like family, friends, fitness and fun.

We cut through the financial noise to create an aligned strategy that is congruent with client's values, your goals and your desired lifestyle. Then we add an unparalleled level of safety by having every recommendation peer reviewed by experts.

We do four things for every client:

- Protect – we protect your financial strategy and your money and we take that role very seriously.
- Attention – our oversight team stays on top of all your personal issues all the time to ensure that everything is moving towards your objectives.
- Co-ordination – we coordinate all aspects of your financial affairs and all of the other financial specialists in your life.
- Transparency – we force full disclosure. You always know what you pay for every service or product and how much everyone is being paid to serve you. We have no ulterior motives and eliminate any potential conflicts of interest.

Dean Kendall is a Financial Organizer in Calgary, handling all of the financial affairs for a select group of clients who value unbiased quality advice for one simple flat fee.

His latest book is Stop Paying Hidden Investment Fees! Click here for more information
<https://ideal-life-experience.ca/deans-book>

In addition, Dean is a 3X Canadian National # 1 Amateur, a 5X Canadian National #1 Professional BMX rider, downhill mountain biker and an avid snowboarder. He is an expert at winning. Let him show you how to win the money game. You can reach Dean at dean@ideallife-experience.ca or Phone 403-543 -7226

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