Helping You Make an Informed Decision

Contact Information

Name: Raymond C. H. Matt, CLU, TEP, CHS Function: Independent Insurance Advisor - Founder

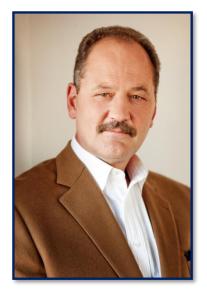
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The Importance of Independence

We are an independent, family owned, life insurance firm that represents all the major life insurance companies in Canada. Our focus is on our clients needs not the financial institutions that we represent. Our office is in Midland, Ontario.

Raymond began his career in 1985 and since 1995 he has operated as an independent insurance broker specializing in helping business owners and their advisors design, implement and manage life insurance plans.

Raymond holds a CLU, TEP and CHS designations. The CLU accreditation identifies an individual that has taken specialized courses in tax, law, and estate planning as it relates to the use, implementation, and management of permanent life insurance plans.

We are expert in the implementation and management of permanent life insurance solutions.

We are expert in assisting CPA's gain a deeper understanding of the benefits, uses and types of life insurance plans available and how those plans will add value for their clients.

We strive to work closely with the advisory team.

What We Do

We help clients and their advisors develop a well thought out life insurance plans.

We help manage the plan over the client's lifetime by providing ongoing service. This includes reviewing quarterly statements to ensure that we are in line with projections, monitor various investments, advise on required adjustments, and prepare in force illustrations as required. We complete an annual review, and we provide the policy information necessary for the corporate year end and answer any questions. We help co-ordinate living benefits in retirement.

At claim time we help the beneficiary, CPA, executor, and the family in filing the claim. We complete all the necessary paperwork, follow up with the insurance company during the claim process.

We deliver the insurance company's benefit cheque to the beneficiary.

We provide the CPA with policy information for the CDA calculation.



Helping You Make an Informed Decision

We also act as an educational resource for CPA's and other advisors that have an interest in helping their clients develop and manage a well thought out life insurance plan.

In short, we help people make informed life insurance decisions through education.

Professional Associations

Advocis The Financial Advisors Association of Canada STEP Society of Trust and Estate Practitioners

Brief Biography

Raymond was born in April 1958 in Peterborough, Ontario, the second of four children. His mother was born in London, England and his father in Essen, Germany. Raymond's parents married in 1948 and immigrated to Canada in 1952.

Since 1979 Raymond and his wife have made Midland home. They have two daughters and two granddaughters. Their oldest daughter taught for several years in Midland, and now works in the business, with her husband and Raymond's business partner, Aaron Ledlie. Their youngest daughter is an Entertainment and Editorial Consultant.

Raymond's hobbies include bird watching, chess and a wide variety of card games. His favourite sports include Formula One racing and rugby.