

## ALIGNING OUR VISION WITH YOUR MISSION MEANS:

- PROTECTING YOUR LIFESTYLE WITH A LONG-TERM PLAN.
- HELPING YOU ENJOY YOUR LIFE WHILE WE FIND YOU MONEY YOU DIDN'T KNOW YOU HAD!
- HELPING YOU MAKE INFORMED DECISIONS AND STAY IN CONTROL OF YOUR FINANCES.

## What makes our team different and how we'll get you there:

- o By getting to know YOU and being present at every milestone of your life with a personal dedication to your family!



- o We stay in motion to help YOU achieve your goals with our unique tools and as we simplify hard financial concepts.



- o We stay present during the critical meetings & conversations you need to have.



### Your Team.

- o Our team has 30 years of combined industry experience and is more than proud of its deeply rooted values in the East end community, all born, raised and educated on the island of Montreal.



**Michael Angiletta**  
Mutual funds representative  
with Investia Financial Services Inc

#### • WHAT HE LOVES...

- o His cigars Cuban and his meals homemade.
- o His debt solutions simple and easy to manage.
- o His clients leaving his office with money they didn't know they had.

#### • WHAT HE'S DONE...

- o Picked up a Management certificate at Concordia University.
- o Was among the elite advisors at 3 of the Canadian Banks.
- o His clients call him the credit guru because he finds solutions to nearly all debt problems. His motto is, "there are no problems, only solutions".

#### • QUIRKY FACTS...

- o One of the best advisors/recreational chefs out there.



**Adamo De Napoli**  
Mutual funds representative  
with Investia Financial Services Inc.

#### • WHAT HE LOVES...

- o His espressos doubled and always black.
- o His investment solutions as simple as possible.
- o His clients leaving his office actually knowing where their money is invested.

#### • WHAT HE'S DONE...

- o Filled his head with finance information at McGill University.
- o Then again at a large mutual fund company.
- o And finally one more time at a Canadian Bank.
- o Not to mention, he has his Canadian Mutual Funds licence and is headed back to McGill for yet another degree... Financial Planning

#### • QUIRKY FACTS...

- o Has helped over 10,000 students graduate to higher levels of education in the past 10 years.
- o Has a passion for Calculus.



**Raffaele Nardi**  
Financial Planner with Finance in Motion Inc.  
Mutual funds representative  
with Investia Financial Services Inc.

Affiliated  
to the IQPF

#### • WHAT HE LOVES...

- o His son the most and his sports motorized.
- o His financial plans clear and tailored to what his clients want to do in their lives.
- o His clients leaving his office knowing he will be there through every important milestone.

#### • WHAT HE'S DONE...

- o Picked up a bachelor's degree in business, a Financial Planner designation (IQPF) and a Canadian Securities License...and he's only in his 30's.
- o He was a director of Financial Planning supporting 40 bank branches.
- o His clients love him because he will never utter "financial" words. His motto is "why complicate my clients' lives? Isn't life complicated enough?"

#### • QUIRKY FACTS...

- o Loves watching HGTV.



## Our Providers and Network of Professionals:

*With years of building trust and experience, our team is proud to have developed an expansive and comprehensive network of professionals that complement our services:*

**- Mortgage Brokers**  
**- Real Estate Agents**

**- Accountants**  
**- Legal council**

**- Estate Planning Professionals**

## Services:

### **YOUR Debt Optimization**

*Finding you the money you didn't know you had.*

As the leader of this service, Michael will comb through your entire financial situation to find any inefficiencies in your life. As we go through life, we spread our debt around to different institutions. This creates confusion and becomes too much to handle.

With his 12 years of credit experience, Michael will guide you towards financial freedom. He will show you simple yet impactful changes you can make in your life that will get you closer to your life goals.



### **YOUR Investment Recommendations**

*Protecting your money.*

As the leader of this service, Adamo will show you potential investment options that will be the vehicles to achieving your goals. In today's world, we are bombarded with much information about where to put our money and who to trust.

With his experience in the mutual fund and banking industry, Adamo will show you many different investment options that can suit your objectives and fit with who you are. More importantly, he will show you how simple these investment choices really are and empower you in the decision-making process.



### **YOUR Retirement Plan**

*Protecting your lifestyle.*

As the leader of this service, Raffaele will take into account all the goals you wish to achieve throughout your life. He will then put in place a personalized plan, suited just for you and that will help you get where you want to go. He will also guide you through every important milestone of your life. With a good plan, everything is possible!

With his 15 years of experience in the banking field, Raffaele is specialised in personal finance and is a graduate Financial Planner of the Institut Québécois de Planification Financière (IQPF). His main goal is to simplify your life and to protect you from unforeseen risk. For us, there are no problems, just solutions.



6020 Jean-Talon E., Suite 450  
Montreal, QC H1S 3B1

514.252.2345

Mutual funds products are offered through

Investia Financial Services Inc.