CIBC PRIVATE WEALTH
WOOD GUNDY

Our Specialized Retirement Wealth Program for Nvidia Canada Employees

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The Jackson Group has been an invaluable partner in managing my wealth and retirement planning for over 18 years. Jen and her team have expertly guided me through the complexities of my Nvidia employee share position, providing strategic advice on risk management, taxation, and dispositions. Their comprehensive approach encompasses my diverse portfolio, including my ESPP, NSUs, RRSP, real estate, and insurance, ensuring a cohesive retirement roadmap. I highly recommend The Jackson Group for their professional expertise, personalized service, and unwavering commitment to helping clients achieve their financial goals.

Fredrik Liljegren
Director Developer Relations, Nvidia

Through our long-standing partnership with Nvidia employees like Fredrik, we have developed a deep understanding of the unique retirement challenges they face. This insight has led us to create a tailored retirement wealth program specifically designed for Nvidia Canada employees, encompassing the following key elements:

› Comprehensive Retirement Planning
We develop a detailed roadmap that outlines your current financial position, retirement targets, and strategies for managing your wealth during retirement. This holistic approach considers all your assets and financial considerations, including your Employee Share Purchase Plan (ESPP), Nvidia stock units (NSUs), group RRSP, real estate, insurance, and government benefits.

› Portfolio Analysis and Optimization
Our team carefully evaluates your existing investments and determines opportunities to enhance your asset mix and risk profile, ensuring alignment with your retirement plan's objectives.

› Personalized Investment Strategy
Our approach focuses on creating a diversified portfolio customized to your individual needs, with the goal of navigating market volatility. We take into account your retirement plan, lifestyle aspirations, and cash flow objectives to offer recommendations suited to your specific situation. As your circumstances evolve over time, we work to adjust your portfolio accordingly.

› Retirement Transition Support
We streamline the retirement process by handling all necessary paperwork and providing recommendations on when to commence your CPP and OAS benefits. Additionally, we develop an asset depletion strategy to help minimize taxes during your retirement and estate planning.

› Estate Plan
Our estate planning specialists collaborate with you to foster continuity between generations and help preserve your legacy. In addition to developing suitable financial structures, we support you in setting goals, facilitating communication, and educating younger family members.

› Ongoing Monitoring and Guidance
In addition to designing and tracking your investment portfolio, we actively monitor your Nvidia stock position to manage the associated concentration and currency risks. Your retirement plan will guide you on the timing and taxation of your Nvidia share dispositions, as well as the optimal asset mix and timing for your retirement income from registered assets.

› Holistic Lifestyle Planning
We understand that a fulfilling retirement extends beyond just financial security. That's why we incorporate a process to help you create a vision and action plan for the non-financial areas of your life. Our approach ensures you have the right mindset and strategies to stay engaged through activities that enhance your mental, physical, and spiritual well-being during retirement.

If you are interested in learning more about our offering, you can explore our website or give us a call directly at the number below. We hope to hear from you soon.

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