


## MARION YOUNG

Born and raised in Chatham-Kent, Marion started her career in banking. With a passion for investments and an interest in helping people acquire financial freedom, Marion discovered her destiny by establishing and maintaining clients for Investors Group in 1992. With a thorough understanding of the phrase 'hard-earned money,' Marion believes firmly in investing wisely and advises her clients accordingly, all the while taking the time to truly understand each of their personal goals. Her strict adherence to sound financial planning and tailoring each client's portfolio to their specific needs has made possible a worry-free retirement lifestyle for many. This 'value added' service has helped her become a successful Certified Financial Planner (CFP).



*"I feel confident and secure investing with Marion. I trust her judgment to make sound financial decisions for me...and she communicates frequently the details of my portfolio. I find her to be a trusted and detailed advisor. My financial portfolio has improved greatly since Marion took over my investments."*

*– Ken Houston, Former NHL Player, Chatham, Ontario.*

## TODAY'S MARKET

In a world where the term 'investing' can be daunting and cumbersome, it takes a competent individual and company to make sense of it all. Marion understands investing and simply makes the best use of your financial resources with the ultimate goal to generate capital and minimize tax. Knowledge and experience is on her side along with a team of dedicated insurance, mortgage and securities specialists at Investors Group, providing answers that are clear and precise.

*"Managing decisions regarding our financial future was intimidating and often frustrating for us. We concluded years ago that we did not have the time, knowledge or inclination to make the best decisions regarding investments, and asked Marion to act as our consultant. Through her experience and vigilance of the markets, and her easy way of explaining the current and projected market trends, Marion makes us feel comfortable and confident in our choices. We feel fortunate to have her and Investors Group working for us."*

*– Bill and Helen Smith, Retirees, Chatham, Ontario.*

## THE RELATIONSHIP...



Investors Group is a national leader in personal financial planning and has helped more than one million Canadians grow, manage and preserve their wealth. The company's dedication to helping Canadians prosper attracted Marion to represent Investors Group. Working in conjunction with the company, Marion educates clients, allowing them to make well-informed, confident decisions regarding their financial plan. In addition, Marion also provides planning for inter-generational transfers of wealth to protect estates by recommending innovative techniques such as multiple wills, trusts, estate freezes, and estate bonds, just to name a few.

*"My husband and I began our relationship with Investors Group in 1977 and it has been a very important addition to our family. Our four children started their financial education by investing during their high school years and are still clients. Continuing the family tradition with their children, Marion now advises three generations of our family. Trust, respect and a valuable friendship have been the result of our family's association with this very special lady and Investors Group."*

*– Jean Bolt, Potter, The Pottery Barn, Wallaceburg, Ontario.*

*"Is it time to incorporate my business or professional practice?"*

*"Can I improve my return on investments without increasing risk?"*

*"How much will I need to retire?"*

*"What type of life insurance, if any, do I really need?"*

*"I've just come into an inheritance, how much should I put toward debt, purchases and investments?"*

*"Do I want to give cash or assets to my heirs while I'm alive?"*

*"How would remarriage affect my assets and financial planning?"*

*"Does my estate plan consist of the necessary will(s) and trust(s)?"*

*"Do I know what my estate taxes would be if death occurred today, 10 years from now, or 20 years from now?"*



**Contact Marion**

*for Solutions*




**Marion Young**  
*Certified Financial Planner*

245 St. Clair Street,  
Chatham, Ontario N7L 3J8  
Ph. 519-358-1115  
Fax: 519-358-1934  
[marion.young@investorsgroup.com](mailto:marion.young@investorsgroup.com)

A high caliber of professionalism, sincerity and honesty has earned Marion a dedicated following. Similarly, Marion has consistently exceeded the standards of competence and ethical practice as set forth by the Financial Planners Standards Council of Canada (FPSCC). Supporting her CFP designation are continuing educational courses that keep her at the forefront of investment planning.

For those who have retirement goals or are already retired with ongoing financial issues, it is imperative to plan and invest properly. So why not start with investing in the right financial planner, Marion Young, CFP.

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*the key ingredient*

*Passion is an essential*

*ingredient for a successful*

*career. Add a vested*

*interest in people, and*

*the profession takes on a*

*whole new meaning that*

*only a few individuals are*

*fortunate to experience, such as*

*Certified Financial Planner,*

*Marion Young.*

