



WHY GRANITE?

"At Granite Financial you receive the benefit of decades of experience, knowledge and expertise. Our focus is the financial planning process that provides a solid foundation for a secure future. We work with clients across Canada to establish and implement their unique plan, ensuring an essential part of their life is well taken care of for years to come"

Doug Lochhead
President, Granite Financial Group Inc.





WHY GRANITE?

"A goal without a financial plan is just a wish. Develop a plan for it and it can be a reality."

Alaina Leduc
Financial Advisor, Granite Financial Group Inc.





WHY GRANITE?

"Business succession planning means the orderly transfer of a business to either an outside successor or from one generation to another in a manner that meets the needs of the owner. This type of planning involves understanding"

Doug Lochhead
President , Granite Financial Group Inc.





WHY GRANITE?

"Tax planning plays a significant role in the wealth of every Canadian. It is important to understand which tax planning strategies are relevant to you in order to determine how to best structure your wealth plan."

Daniela Ignat
Vice President & Financial Advisor, Granite Financial Group Inc.





WHY GRANITE?

"With a group RRSP, eligible employees can have RRSP contributions deducted from each pay period. Direct contribution from payroll automatically reduces income tax for the employees."

Doug Lochhead
President , Granite Financial Group Inc.





DOUG LOCHHEAD



DANIELA IGNAT



ALAINA LEDUC



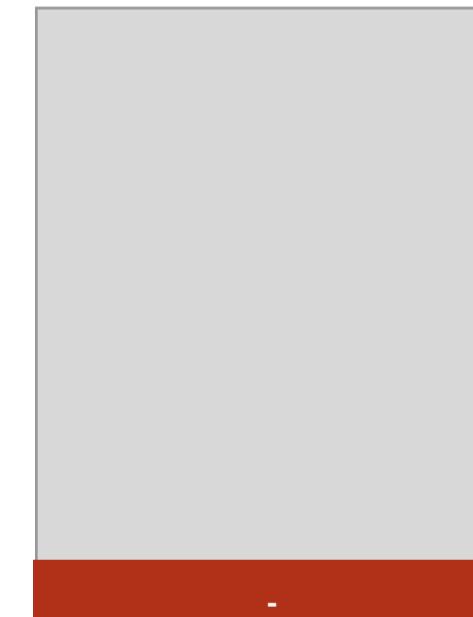
KARA CARA



DEBBIE DOERKSEN



MARLENE BUSS



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DOUG LOCHHEAD



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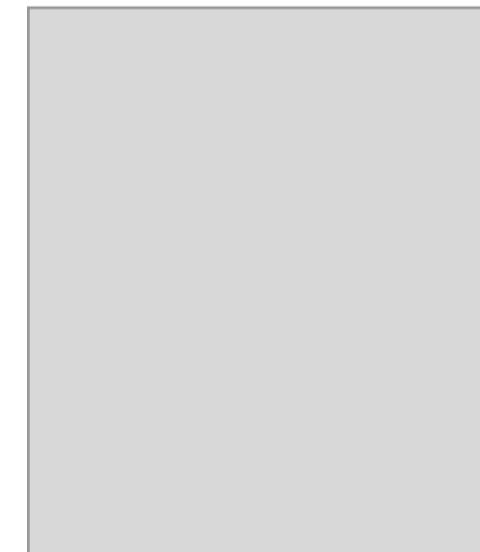
KARA CARA



DEBBIE DOERKSEN



MARLENE BUSS



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DOUG LOCHHEAD B.Comm (Hons.) CFP, RFC, CIM

President & Senior Financial Advisor

With over 25 years experience, my specialty lies in working with high net worth business owners and professionals who wish to minimize taxes while preserving their wealth.

My career began in the corporate world including working 13 years for a large Canadian Chartered Bank. However, I came from an entrepreneurial family background and I decided to return to my roots which led to the creation of Granite in 2002. Over the years, I have provided support and business direction to budding entrepreneurs and am currently an active member of the Entrepreneurs Organization.

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I am proud to be involved with numerous philanthropic organizations in Manitoba, most notably, I am the current Chair of the Opportunities for Employment organization and a member and host sponsor for Winnipeg Harvest and its Charity Golf Tournament.



DANIELA IGNAT CPA-CGA, CFP, CIM

Vice President & Financial Advisor

Daniela joined Granite Financial Group Inc. in 2001 with over 10 years of banking experience with a major national Canadian Bank.

Daniela has over 20 years of experience within the financial services industry as well as, prior to coming to Canada, had held various management positions with the government and the private sector. Daniela has earned a Masters of Economics, from the Faculty of Commerce at the Academia de Studii Economice – Bucharest. Daniela specializes in tax, estate planning and retirement planning for clients.

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Daniela is actively involved in her community through the Romanian Society of Manitoba. Daniela prides herself in delivering not only the best financial solutions for her clients based on her extensive knowledge, but consistent exceptional customer service.



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ALAINA LEDUC CFP, FMA, FCSI

Financial Advisor

Alaina joined Granite Financial Group April 2013. She has brought with her over 25 years of experience in banking and full financial planning with the Wealth Management segment of a major Canadian Bank.

Alaina holds the Certified Financial Planning designation, the Financial Management Advisor designation, she has obtained her Registered Retirement Consultants designation, and she is a Fellow of the Canadian Securities Institute. She brings to the Granite team her years of expertise and experience in wealth and client portfolio management and service.



KARA CARA

Advisor Assistant

Kara joined the Granite team in 2011 and brings her enthusiasm and expertise in ensuring client service and sales are processed in an efficient and satisfactory manner.

She is a graduate of the Business Administration program at Red River College. Kara works closely with Richard Lochhead as well as provides administrative support to the entire team.

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DEBBIE DOERKSEN

Advisor Assistant

Debbie joined the Granite Team in September 2013. She brings with her experience in the financial services industry with over 29 years of administrative experience and sales, with a major Canadian Bank.

Debbie brings to the Granite team, her years of proven expertise in providing top level service to clients.

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MARLENE BUSS

Advisor Assistant

Marlene joined the Granite team in May 2012. She brings with her extensive experience in the financial services industry with over 33 years of administrative experience in both the life and financial industry.

Marlene supports the entire team with her proven administrative strength and expertise.

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PERSONAL SOLUTIONS

FINANCIAL PLANNING +
TAX PLANNING +
ESTATE PLANNING +
RRSP +
RRIF +
TFSA +
RESP +



BUSINESS SOLUTIONS

BUSINESS SUCCESSION PLANNING +
KEY PERSON MANAGEMENT +
GROUP BENEFITS PLAN +
GROUP RETIREMENT PLAN +



INSURANCE MANAGEMENT

LIFE INSURANCE +
DISABILITY INSURANCE +
CRITICAL INSURANCE +
LONG TERM CARE +



PERSONAL SOLUTIONS

FINANCIAL PLANNING +

Planning your financial future is one of the most important things you can do with your life. Every successful aspect of your life requires planning, whether it is planning a weekend, or planning a year long home improvement project. Personal financial planning could be the most important of all, because it can secure yours and your loved ones futures.

TAX PLANNING +
ESTATE PLANNING +

RRSP +
RRIF +
TFSA +
RESP +



BUSINESS SOLUTIONS

BUSINESS SUCCESSION PLANNING +
KEY PERSON MANAGEMENT +
GROUP BENEFITS PLAN +
GROUP RETIREMENT PLAN +



INSURANCE MANAGEMENT

LIFE INSURANCE +
DISABILITY INSURANCE +
CRITICAL INSURANCE +
LONG TERM CARE +



RETIREMENT PLANNING

Develop a retirement plan



MAJOR PURCHASES

Estimate your total costs and
savings required



EDUCATION

Plan for your education goals



MEDI-QUOTE
INSURANCE
BROKERS

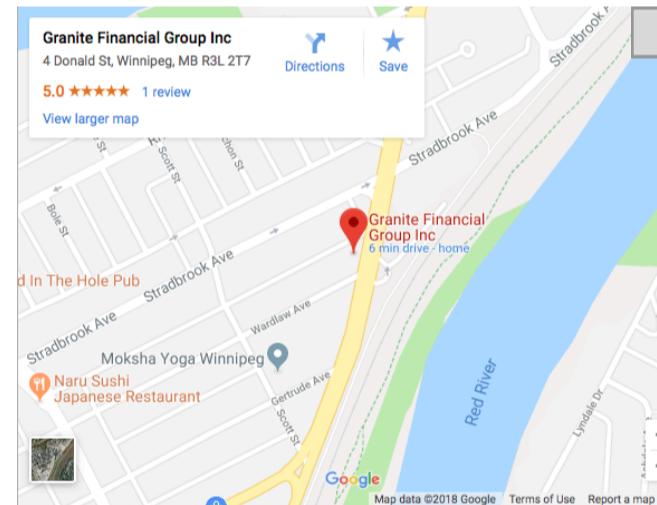
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