



IRONSHIELD®
FINANCIAL PLANNING

NO LIMITS Financial Planning™

Jennifer has specialized in advising, implementing, and servicing solutions for clients since 1999.

Jennifer's approach to helping clients plan effectively and weather the impact of uncontrollable situations is simple: straight talk. Indeed, her direct but ultimately compassionate style is unique and has made her a leading expert in long-term planning strategies that promote choice and dignity.

When a life-changing event occurs, no one should ever have to compromise, much less sacrifice, what is important to them. This bedrock belief is why Jennifer does what she does.

Jennifer is a past board member and current member of the Living Benefits Committee for the Conference of Advanced Life Underwriters (CALU).



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REVEALING UNTAPPED POTENTIAL TO KNOW NO LIMITS™



As a Managing Partner, Jennifer follows the disciplined KAIZEN Financial Planning Process™. Thinking “outside the box” to get to the heart of clients’ issues and concerns allow them to progress beyond their perceived limits.



Certified Financial Planner® certification is the most widely recognized financial planning designation and is considered the standard for the profession. CFP® professionals have demonstrated the knowledge, skills, experience and ethics to examine their clients’ entire financial picture, at the highest level of complexity and work with their clients to build a financial plan.



The Chartered Life Underwriter (CLU) designation holders are regarded as elite professional financial advisors who raise the bar in developing effective solutions in the areas of risk management, wealth creation and preservation, estate planning, and wealth transfer.



The CHS is the only health insurance-focused designation in Canada, which strategically positions financial advisors to meet the growing market demand for informed living benefits advice.



The role of the Elder Planning Counselor holds particular significance when it comes to addressing the financial, social, or health-related aspects of seniors’ lives.

The KAIZEN Financial Planning Process™ Is Suited To:

Business owners building retained earnings annually in closely held companies with families, living in Canada. They are tax frustrated with poor future planning and are seeking more control.