

Vancouver Financial Advisor Nancy Lee to Lead Series: "How Canadians Can Retire With More, Save Taxes, Leave a Legacy"

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/EINPresswire.com/ -- For Canadians, retiring successfully today is more challenging than ever, fraught with obstacles like market volatility, inflation, rising healthcare costs, and changing tax laws that threaten even the best-laid plans.

According to CTV News, "77 percent of Canadians aged 55-69 are worried about retirement finances."¹

Author, Speaker and Financial Advisor, [Nancy Lee](#), is excited to announce her upcoming public seminar series, "Retire With More, Save Taxes, Leave a Legacy," designed to help Canadians successfully navigate the complexities of retirement planning. This series will explore strategies that empower retirees to safeguard their financial future and preserve their wealth for the next generation.

"Retirement planning today isn't just about securing wealth—it's about ensuring your lifestyle in retirement is a fitting reward for your years of hard work, it reflects your vision and the legacy you wish to leave behind is something you are proud of," said Lee. "In our seminar series, I'll share proven strategies to not only safeguard your wealth but also ensure it supports your desired lifestyle and future goals."

Key topics covered during the seminar include:



Plumtree Wealth Strategies



Nancy Lee

- Retirement Income Strategies: Protecting and growing wealth in an uncertain financial environment.
- Tax-Saving Techniques: Strategies to minimize taxes and maximize retirement income.
- Legacy Planning: Ensuring your wealth continues to benefit future generations and charitable causes.
- Navigating Modern Financial Risks: How to plan for rising costs of living, healthcare expenses, and market volatility.

The seminar series is complimentary and will be hosted at various locations across Vancouver. For more details and to register call (604) 687-3464.

About Nancy Lee

Nancy Lee is a recognized and respected Financial Advisor, Speaker and Author. As the Founder of Plumtree Wealth Strategies, she and her team have helped countless business owners, professionals and retirees successfully navigate the retirement journey with confidence, security and dignity. She is also known for her 'Retire With More, Save Taxes, Leave a Legacy' seminar series attended by those seeking financial clarity in retirement. When she's not guiding clients, Nancy, a black belt in karate, enjoys traveling the world with her husband, Chris, and volunteering at her local church.

(1) <https://www.ctvnews.ca/canada/article/77-per-cent-of-canadians-aged-55-69-worried-about-retirement-finances-survey/>

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