



At Serre Financial, we know money equals opportunity— for business, for family, for life

That's why for over 15 years we've partnered with professionals, new and existing business owners, and executives to deftly navigate and mine the complex benefits of Canada's Income Tax Act.

Our approach is uniquely holistic, totally customized. No one-size-fits-all products — rather, we roll up our sleeves to work with trusted advisors of business owners and professional clients across Canada.

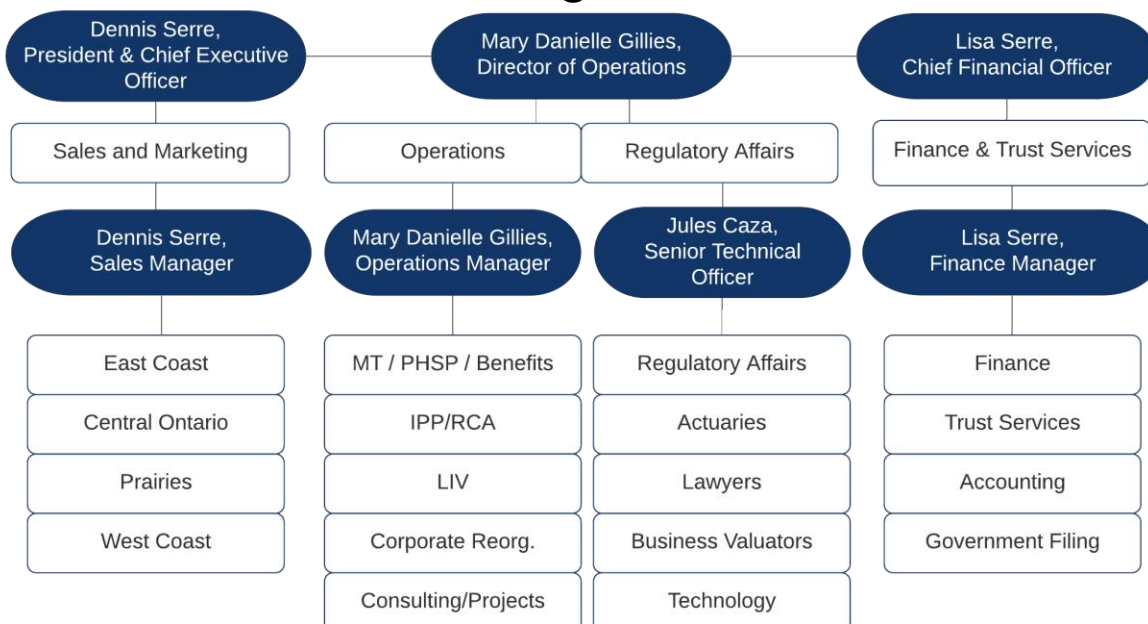
Our goal: finding maximum value and benefits in each client's individual business, personal, and family situations. As we see it, your success or your clients' success is our success in the four *Quadrants of Opportunity* seen here.

Count on superior service and integrity in our best-in-class solutions. It's all to one end - to deliver every advantage and opportunity that comes with building the bottom line.

Learn more about us, our solutions, and what our clients say about us at www.serre.ca.



Our Organization:



Our Management Team:



Dennis Serre, President & Chief Executive Officer

Dennis offers over 30 years of industry experience to clients and advisors. A member of many pension committees, Dennis is an industry leader in researching and providing new tax strategies and solutions for business owners and professionals.



Lisa Serre, Chief Financial Officer

Lisa offers 30 plus years in management accounting. She oversees all Serre financial government filings and auditing procedures. Lisa's forté is accurate and precise deliverables while ensuring cost effectiveness and efficiency in operations.



Mary Danielle Gillies, Director of Operations

Exemplary among her peers, MD brings a 15 year track record in delivering a triple-bottom line in the banking industry and managing in-depth credit structures, advising business owners on start-ups, exit financing, mergers and acquisitions.



Jules Caza, Senior Technical Officer

Jules's key role is to ensure solutions and services are kept current with regulatory body compliance, rules and regulations. He offers 15-plus years experience in software design, development and management. Jules has degrees in mathematics and engineering.

For more information, contact us at 1-866-927-0111 or at services@serre.ca.