

Expanding Our Services

OUR MISSION is to become true partners and go-to educators. We will bring our external partners to consult with you whenever required to solidify and adhere to true comprehensive wealth planning – with a particular focus on aiding our families in the wealth transfer conversation and estate administration.

Our Household of Service Partners



These services are not offered through IPC Investment Corporation or IPC Securities Corporation. Please contact your advisor directly and they can refer you to the trusted suppliers for consultation.

What Makes Us Different?

Our **People** are all fully licensed and engaged in our families affairs from a service and admin perspective. CWP is a team of professionals with great credentials, qualities, skills, and intentions.

Our **Processes** have been developed and refined over many years. They engage all elements, every piece of the puzzle to provide our families with the full picture.

Our **Practice** is set up to cater to the needs of each unique family. We know that a one size fits all approach won't work and we don't want it to.

Tara-Lynn Byron, CEA
Financial Advisor



Pat Flemming, CFP®, CEA, CIM®
Associate Portfolio Manager

