Manulife Investment Management

Tax, Retirement, & Estate Planning Services

Who we are

Tax, Retirement, and Estate Planning Services (TREPS) is an industry-leading team of accountants, lawyers, and other specialists skilled in identifying opportunities for advisors and clients within changing regulatory and market environments. With extensive knowledge and experience in tax and legal matters related to investments, the TREPS Wealth team provides case-level advisor support working with our sales teams.

Our mission

Our goal is to help advisors navigate the complex world of taxation, retirement, and estate planning using investment products. We assist you in understanding the current environment by delivering technical knowledge and innovative investment concepts and solutions.

What we can offer you

We provide technical support and educational materials related to:

- tax planning
- estate planning
- wealth accumulation
- retirement planning
- creditor protection
- beneficiary and ownership
- sales concepts

How we can help you

Manulife Investment Management wants to help you grow your business by providing you access to a team of professionals, located regionally and at head office, who have the expertise to help you deliver innovative solutions and approaches tailored to meet your clients' unique needs.

How to access our services

Contact your Manulife Investment Management wholesaler, who can review your case and engage our team of experts, as needed, to support your specific needs. For more information on what we can offer and to view our educational materials, visit www.manulifeim.ca/treps.

For TREPS insurance support, see the TREPS Individual Insurance team information at www.manulife.ca/advisors/treps.

MK2973E MBPSCS7401E RLSQ 01/2023 AODA

For advisor use only.