

NEW INSURANCE TAX SPECIALIST ANNOUNCEMENT



Meet Mike Jones, CPA

On behalf of the Westward team,

We are thrilled to announce that Mike Jones will be joining Westward Advisors Ltd. as our new Insurance Tax Specialist, effective October 4, 2024. In this key role, Mike will work closely with our President and support our sales and management teams in providing clients and their advisors with expert insurance-based tax and estate planning advice.

Mike brings over six years of diverse experience in public tax and accounting, having most recently served as a Senior Consultant at KPMG. His background includes extensive work in tax planning, advisory, reporting, and compliance services for private companies and their shareholders. His proficiency in developing strategic tax solutions and mentoring junior team members will greatly benefit our team and clients alike.

A Chartered Professional Accountant (CPA) of British Columbia, Mike is currently completing his third and final year in the CPA In-Depth Tax Program, further solidifying his expertise in this specialized area. He is known for his strong analytical skills, attention to detail, and a collaborative approach that emphasizes relationship building.

Beyond his professional accomplishments, Mike is committed to fostering a positive work culture, having organized team events and activities at his previous firms. He is an ambitious self-starter, ready to contribute to Westward's mission of delivering and managing tax efficient life insurance solutions.

Please join us in welcoming Mike to Westward Advisors. We look forward to the valuable contributions he will make to our team and our clients. Mike can be reached at mikej@westwardadvisors.com.

The Westward Team



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