



Summer 2025

Sigma Wealth Management

Dear customers,

Welcome to this new edition of our newsletter dedicated to wealth management. Each season, we select relevant, practical and inspiring articles for you to help you grow, protect and pass on your wealth.

In this edition, you will discover a variety of topics ranging from the new parental union plan to life insurance, to the benefits of family trust as well as an article on investment fraud. We have also created the *Entrepreneurs' Corner* for dedicated articles on entrepreneurship.

Our goal: to provide you with clear, useful content tailored to your needs, to help you make informed decisions about your financial future.

Happy reading!



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The right to foresee



De facto spouses who have or adopt a child on or after June 30, 2025, will be automatically subject to the new parental union regime. No steps need to be taken. The parental union takes effect only on the child's date of birth or adoption and is not retroactive.

[Read article](#)

Life Insurance : Planning ahead



You never know what life has in store for you. If you die, who will pay your debts, your mortgage and the cost of your funeral? Who will support your loved ones financially? Life insurance can be a solution. Since it can sometimes be difficult to understand the world of life insurance, this article explains some of the rules and steps you should be aware of.

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What are the benefits of a family trust?



Setting up a trust could help you reduce your tax burden, plan how to transfer your wealth, protect your assets and provide for the next generation. This is particularly true for business owners. Read on to find out if a trust is a good option for you.

[Read article](#)

Investment scams: CSA, CAFC and RCMP urge vigilance and reporting



“Online investment fraud poses a significant risk to Canadians’ financial security and well-being,” said Stan Magidson, CSA Chair and Chair and CEO of the Alberta Securities Commission. “We are witnessing a concerning trend of fraudsters exploiting digital and social platforms to target Canadians and we urge everyone to be cautious and research each investment opportunity before handing over your hard-earned money.”

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Entrepreneurs' Corner

How to prepare your personal transition for a business transfer



Selling a business frees up a considerable amount of time in the schedule and can change social status or even family dynamics. After years spent mostly at work, it is time to communicate personal intentions and confirm the aspirations of the other parties for a smooth process.

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