SHARMA WEALTH MANAGEMENT

BUILDING & RETAINING WEALTH

SHARMA WEALTH MANAGEMENT

Building Wealth for Generations

For over 2 decades, Sharma Wealth Management has provided discreet, relationship-driven wealth advisory services to high-net-worth business owners, individuals, entrepreneurs, and families seeking long-term clarity, confidence, and stewardship of their financial legacy.

Advanced Wealth Strategies | Tax-Efficient Investment Structuring | Estate and Succession Planning | Intergenerational Wealth Transfer Planning | Family Governance and Legacy Frameworks

sharmawealth.ca | 905-602-9991 | support@sharmawealth.ca

2560 Matheson Blvd. E, Suite 324, Mississauga, ON L4W 4Y9

Licensed in Alberta, British Columbia and Ontario

Advisory Team

Naresh Sharma MBA, CFP
Director, Sharma Wealth Management

Renu Sharma B. Com, M. Com
Director, Sharma Wealth Management

Paul Church, B.sc, P.Eng
Director of Acquisition, Sharma Wealth Management

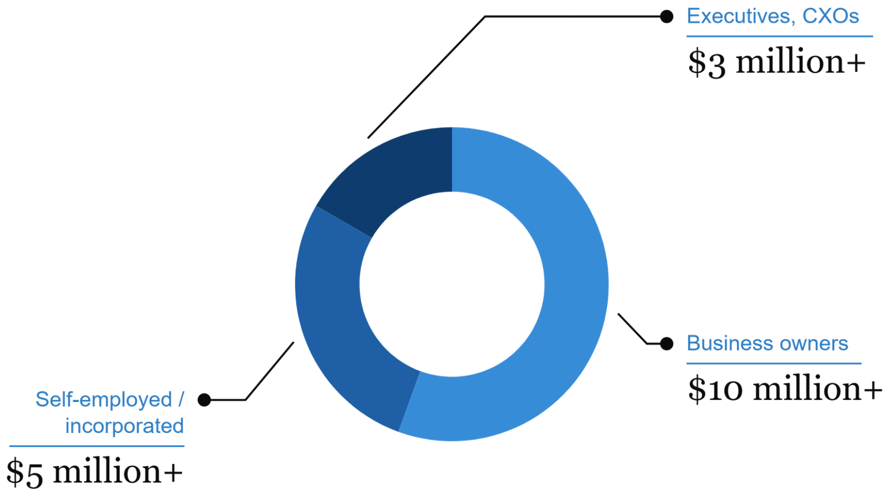
Pranshu Saini, CFA
Associate, Sharma Wealth Management

Apoorva Sharma
Assistant Manager, Sharma Wealth Management

Alexandra Zaynulina
Marketing & Ops, Sharma Wealth Management

Our Ideal Client

Net worth requirements:



Includes a $2 million minimum in investible assets

We specialize in serving successful individuals and families who value a long-term, relationship-driven partnership.

Business Owners & Entrepreneurs

Owners of private companies and professional corporations aligning business growth, tax efficiency, succession, and retirement goals.

Professionals & Executives

Physicians, lawyers, engineers, and executives focused on tax-efficient compensation planning and long-term wealth building.

High-Net-Worth Families

Multi-generational families focused on wealth preservation, estate planning, and efficient asset transfer across generations.

Retirees & Pre-Retirees

Those approaching or in retirement who want sustainable income, tax-efficient withdrawals, and peace of mind.

Let's Start the Conversation

Whether you are building wealth, preparing for retirement, planning a business transition, or protecting your family's future — we invite you to schedule a confidential consultation.

Office	2560 Matheson Boulevard East, Suite 324 Mississauga, Ontario L4W 4Y9
Phone	905-602-9991
Email	support@sharmawealth.ca
Website	www.sharmawealth.ca
Hours	Monday - Friday, 9:00 AM - 5:00 PM

Licensed in Alberta, British Columbia and Ontario

Ready to take the next step?

Contact us today to schedule a private consultation.

Scan for digital copy