

# PLATFORM

JANUARY 14, 2025

## PLATFORM Announces Launch of PLATFORM Financial

### A Specialized Life Insurance Advisory Service Offering

**P** LATFORM Insurance Management Inc. (PLATFORM) is excited to introduce its latest venture; PLATFORM Financial, a dedicated division focused on providing life insurance advisory services, with an emphasis on Tax & Estate Planning for business owners, high net worth families and individuals. PLATFORM welcomes credentialed professionals and trusted advisors: **Daniel Kachani, Noor Al-Awqati, Jeremy Reinbolt, Shaighan Chaudhary, Simon McInnis and Evan Johnson**, bringing together extensive experience in the affluent advisory sector in Canada.

Matthew Francis, Executive Chairman of PLATFORM, expressed his enthusiasm for the new team, stating, "We have been patiently evaluating complementary services to expand our offering. Life Insurance as an investment class and estate planning tool has been on our radar for many years. Finding the right partners has been of critical importance. PLATFORM Financial is a perfect fit alongside our Commercial P&C, High Net Worth Personal P&C and Employee Benefits practice groups. We are truly excited to welcome Daniel and Team."

Mr. Francis added, "recognized for its strategic support in the Canadian developer, construction, and infrastructure community, PLATFORM has experienced remarkable growth and client retention. The addition of PLATFORM Financial further strengthens the firm's commitment to innovative risk solutions across diverse business sectors. The integration of PLATFORM Financial with the PLATFORM offerings is the next step in PLATFORM's mission to function as an Enterprise Risk Solution Group for clients."

Together with the PLATFORM Financial team, Daniel Kachani, Managing Partner of PLATFORM Financial is determined to provide exceptional service and expand the suite of offerings for clients. Mr. Kachani stated "Life

insurance holds immense importance in tax and estate planning, providing valuable strategies to mitigate long-term capital gains exposure experienced by individuals and families who own privately held entities, including shares and direct holdings. PLATFORM is optimally positioned to deliver substantial and impactful financial strategies to our clients through the introduction of PLATFORM Financial."

#### ABOUT PLATFORM

PLATFORM is a privately held, employee-owned Canadian brokerage specializing in insurance, surety and sub-default insurance for the built environment. With a team of dedicated professionals and a commitment to excellence through simplicity, PLATFORM delivers tailored solutions to meet the diverse needs of its clients.

#### ABOUT PLATFORM FINANCIAL

PLATFORM Financial is a specialized life insurance advisory firm that develops custom solutions to business owners, high net worth families and individuals with an emphasis on tax, estate planning, and intergenerational wealth strategies.

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## ABOUT PLATFORM

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PLATFORM is a national, privately owned Canadian brokerage specializing in insurance, surety, sub-default insurance and benefit solutions. We are driven by industry at the heart of everything we do. Our team blends sophisticated expertise with strategic thinking, ensuring that our tailored solutions meet and exceed client expectations.

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