Our values and mission

At Mothus Financial Services, we're building a business with integrity by incorporating generosity, compassion, professionalism and honesty. In a world focused on profits, we honour our core values by establishing a relationship with Clients that emphasizes their financial well-being and education.

Clients will receive a broad overview of all the options available to them. We'll work together to meet their financial needs, and find the solution that works best for them. We will also ensure they understand the cost, as well as the benefits, of the solution and provide suggestions. Clients will have the opportunity to implement the strategy in the manner that works best for them.

> We recommend Clients take the time to look over the suggested solutions at home, and decide what works best for them.
>
> This zero-pressure approach helps us stay aligned with our main mission, which is NOT to sell, but to educate. The rest is up to you!

At Mothus Financial Services, we show Clients all the possible options for protecting their loved ones, their assets, and their future.

Contact our office to get started. We can help.

MOTHUS FINANCIAL SERVICES INC.

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Mothus Financial Services Inc.

Sun Life

Sun Life | MOTHUS FINANCIAL SERVICES INC.

Products and services:

Registered savings plans
Registered retirement savings plans (RRSPs)
Locked-in retirement account (LIRA)
Registered education savings plans (RESPs)†
Registered disability savings plans (RDSPs)
Tax-free savings account

Registered Retirement income plans
Registered retirement income funds (RRIFs)
Life income fund (LIF)

Non-registered investments

Investments
Accumulation annuities
Segregated fund products
Guaranteed investment certificates (GICs)**
Mutual funds†
Payout annuities

Life insurance
Permanent insurance
Term insurance
Universal life insurance
Mortgage protection insurance

Health insurance
Critical illness insurance
Disability insurance
Travel insurance
Personal health insurance
Long-term care insurance

Business solutions
Business continuation and succession planning
Funding buy-sell and partnership agreements
Key person protection
Employee group benefits

Estate and financial planning services (EFPS)
Estate planning
Retirement planning
Taxation
Investment strategies
Money management related to tax and planning
Contingency planning

The role of EFPS is to provide professional financial planning services which include: estate planning, retirement planning, taxation, investment strategies and money management related to tax, planning factors and contingency planning.
**GICs issued by Sun Life Financial Trust (Canada) Inc.
†Mutual funds distributed by Sun Life Financial Investment Services (Canada) Inc.

Meet the team

David Mothus* CDFA, CEA

Advisor, Sun Life

David began his career in financial services because of a love of helping his friends with their finances. This has expanded as he had taken the time to get the CDFA and CEA designations. Serving as an advisor since 2011, he specializes in assisting Clients with:

- personal and corporate wealth-building strategies,
- insurance protection strategies, and
- retirement planning.

He works tirelessly to provide Clients with the knowledge, guidance and motivation to help them fulfill their plans.

The Million Dollar Round Table have recognized David's hard work, commitment and success for over five years by naming him as a Court of the Table member.

Outside of work, David volunteers with BC Cancer as an ambassador for Northern BC. He's the creator of Hell Yeah Prince George on social media with 45,000 active members spreading positivity, and he's on the board of the Tabor Lake Cleanup Society. When he's not busy with these associations, David loves spending time on the lake and snowmobiling. He also enjoys spending time with his foster child, dog and his beautiful partner, Tanya.

Sherrie Tkachuk

Advisor Assistant, Sun Life

As the Executive Assistant, Sherrie enjoys sharing with Clients the knowledge she's gained throughout her career. The more she learns, the more she understands that planning for their future doesn't have to be stressful.

In her role, she does many administrative tasks for the team. She sets up meetings, processes paperwork, and provides exceptional service to Clients.

When she's not working, she enjoys spending time with her nephews. You'll often find her singing and playing ukulele, paddleboarding, golfing, camping, or hiking.

Our Client service process

Initial meeting
When you work with us, the first step we take together is learning about each other. We'll meet to determine your immediate goals and long-term vision. We'll also share our investment philosophy.

Fact finding
Once we understand your goals, we'll review your current situation. We'll determine the resources of your wealth and health. At this time, we may connect with other business professionals who may be able to help you.

Begin your journey
We'll create a thorough roadmap with the goal of improving your wealth and health. We'll review our recommendations with you and then help you put your plan into action. Then, we'll help you put the plan into action.

Follow up
Every roadmap goes through a periodic review. We'll monitor all your results and, together, develop further wealth and health goals.

*Mutual fund business is done with your advisor through Sun Life Financial Investment Services (Canada) Inc.
Advisors and their corporations conduct insurance business through Sun Life Financial Distributors (Canada) Inc.