



financial backup for life.

May 2024 Newsletter

Cottage & Cabin Succession Webinar

Aviso Experts Webinar

Cottage and cabin succession

June 12, 2024



Mutual funds and other securities are offered through Aviso Wealth, a division of Aviso Financial Inc.

Live webinar invitation – Cottage and Cabin Succession

Register today!

Webinar topic: Cottage and Cabin Succession Date & Time: Wednesday, June 12, 2024 (two sessions available)

Speaker: Doug Carroll, Tax & Estate Specialist at Aviso Wealth Inc. Platform: Zoom

Cost: Free!

Session 1: 12:00 pm ET – <[Register here](#)>

Session 2: 3:00 pm ET – <[Register here](#)>

Owning a family cottage or cabin is more than just having a second home. It's about preserving the legacy and memories that have been passed down from generation to generation. However, along with this joy and nostalgia, there are also various complexities that come with owning such properties. Our upcoming webinar will provide valuable insights and strategies for effectively managing and passing down your retreat to future generations.

Our featured speaker, Doug Carroll, resident tax expert at Aviso Wealth Inc., will guide us through a comprehensive session. In his talk, Doug will outline key topics including capital gains, principal residence planning and trust transfers, helping you navigate these hurdles to protect your family wealth.

Register for this webinar, and don't miss our on this opportunity to learn, connect and proactively plan for the next generation.

We are proud to host this special event in partnership with Aviso Wealth.

Aviso Wealth Inc. ('Aviso') is a wholly owned subsidiary of Aviso Wealth LP, which in turn is owned 50% by Desjardins Financial Holding Inc. and 50% by a limited partnership owned by the five Provincial Credit Union Centrals and The CUMIS Group Limited. The following entities are subsidiaries of Aviso: Aviso Financial Inc. (including divisions Aviso Wealth, Qtrade Direct Investing, Qtrade Guided Portfolios, Aviso Correspondent Partners), and Northwest & Ethical Investments L.P.

The who's who of the OPPACU



Meet our Summer Student Teddy!

Hello everyone my name is Teddy McCollum-Kuntz, and I am so excited to be working as a summer student at the OPPA Credit Union!

A little bit about myself, I am 20 years old and grew up in Orillia, Ontario with two parents who are now retired from the OPP. I am currently in my third year of university, attending the Ivey School of Business at the University of Western Ontario. While in London, many of my courses surround business administration, and as someone who enjoys school, I've found it interesting to learn about how successful businesses operate and what it takes to make meaningful change in today's world.

[Read more...](#)

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Full Site: log into banking, select Profile & Preferences from the menu, then 2-Step Verification Settings.

APP: log in, go to Settings, then 2-Step Verification Settings

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OPPACU members, families and friends using the All-Purpose Realty referral service receive cash rewards based on transaction values. \$25 for each \$10,000 increment of completed real estate transactions.

Example, sell a home for \$800,000 receive \$2000. Purchase a home for \$900,000 receive \$2250.

[Details & Info](#)

[More Details](#)



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NEW ONLINE PORTAL & APP

Collabria is excited to launch CardWise to cardholders. Cardholders can continue to use MyCardInfo to manage their credit card accounts during the phased

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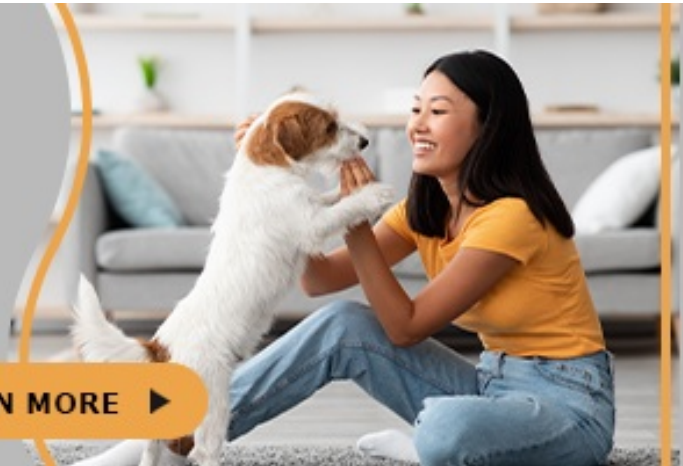
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Simplify your finances with
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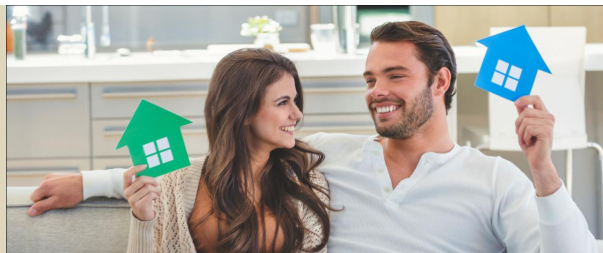
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[2024 BALANCE TRANSFER OFFER](#)

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**5 Year Fixed High Ratio
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**2023-2024 As low as
5.65% 2021-2022 as
low as 8.20% 2020 &
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*Conditions apply - subject to change

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**2024 Canine
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