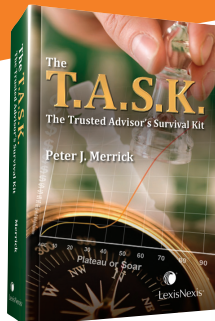


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## Foreword by Mort Shapiro

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**About the Lead Author**

**Peter J. Merrick, B.A., F.M.A., C.F.P., T.E.P., F.C.S.I.**, is the President of MerrickWealth.com. His expertise covers financial planning, investment risk management, estate and business succession planning, cross border planning, and the executive benefit and pension fields. Some of Canada's largest financial institutions and accounting and legal firms have retained him to provide executive benefit consulting, succession and estate planning solutions to owner managed businesses. A frequent speaker and writer, Mr. Merrick has presented over 700 classes, seminars, and workshops to such organizations as the Canadian Institute of Chartered Accountants, Human Resources Professionals Association of Ontario, and Financial Planners Standards Council of Canada.

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