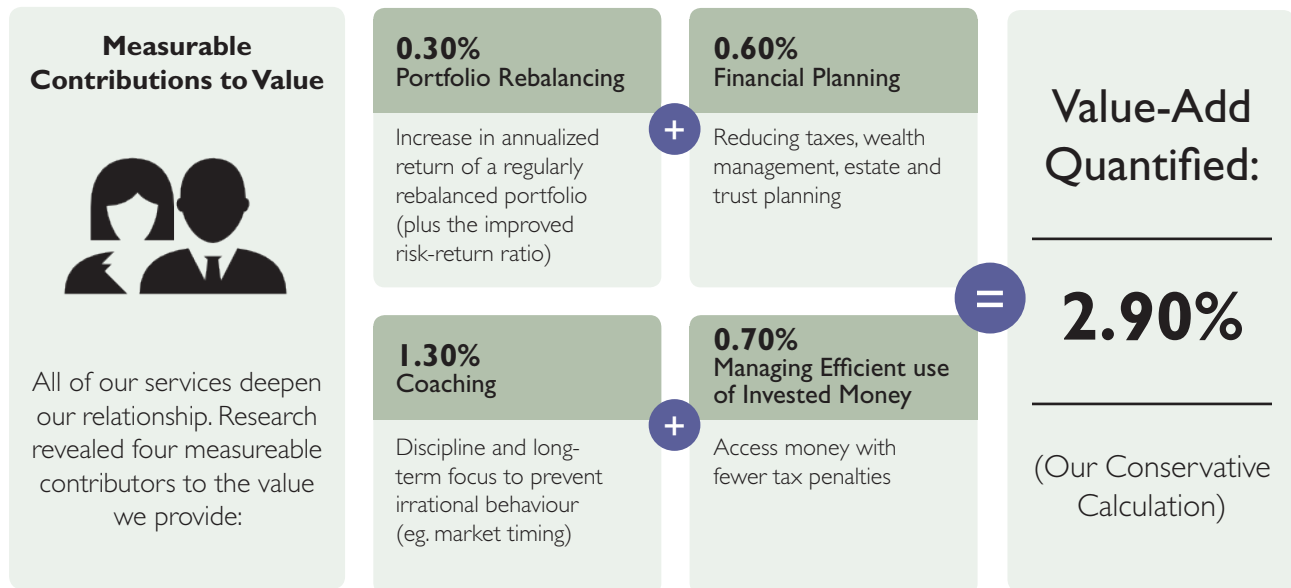


Value of my Advice

Our Services:

- Advice • Meetings • Wealth Management • Estate Planning • Retirement Planning • Tax Planning • Referrals • Research
- Insurance Consulting • Education Savings • Discipline • Goal Setting • Tracking • Education • Risk Management



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The Tip of the Iceberg

You will experience this value in our meetings, but do you know what we do when we're not together?

- Create financial plans
- Prepare documents for our meetings
- Process documents
- Perform annual 10% free conversion
- Analyze tax plans
- Calculate RESP contributions to maximize benefits
- Allocate assets
- Conduct economic research
- Tax deductibility
- Network
- Calculate TFSA contributions to maximize benefits
- Conduct annual reviews
- Make phone calls
- Communicate via email
- Change portfolio managers
- Create newsletter
- Meet with suppliers
- Monitor performance of your investments



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