# Things We Do For Our Clients

**Our team is dedicated to helping you reach your financial goals. In addition to our core wealth management services, we also provide a number of value-added solutions to support the maintenance and growth of your investment portfolio.**

## RELATIONSHIP MANAGEMENT

- Help you set realistic financial goals
- Help you control your emotions
- Help to educate you and your family
- We are always available to you
- We will guide you through tough times
- We will always be honest with you
- Help you manage and understand risk
- Help you prioritize
- Help you evaluate risk
- Monitor and keep you on track
- We will put your needs first
- We will proactively keep in touch
- We are a good sounding board

## FINANCIAL PLANNING

- Prepare a written financial plan
- Prepare an estate plan*
- Seek to understand needs
- Clarify current situation and optimize current assets
- Provide retirement planning
- Provide intergenerational planning
- Identify your savings shortfalls
- Review retirement accounts
- Review life insurance
- Monitor life changes

## CASH FLOW MANAGEMENT

- Prepare asset allocation plan
- Provide recommendations for your unique situation
- Suggest tax-efficient strategies
- Monitor your investments
- Suggest portfolio changes
- Provide alternative investment options
- Help with your debt reduction strategy
- Reposition investments as a tax advantage
- Facilitate transfer of investments
- Prevent duplicate holdings

## INVESTMENT MANAGEMENT

- Provide a written IPS (Investment Policy Statement)
- Perform due diligence on a variety of products and investments
- Perform due diligence on money managers
- Provide referrals to other professionals
- Work with your tax/legal advisors
- Stay current on industry changes
- Provide access to IPO's
- Provide research
- Shop for best interest rates
- Provide online account statement access

*Estate planning services are offered by Canaccord Genuity Wealth & Estate Planning Services Ltd.