





INDIVIDUALIZED PORTFOLIO CONSTRUCTION

Plan Types

Non-registered funds

Registered Retirement Savings Plan (RRSP)

Registered Retirement Income Plan (RRIF)

Tax Free Savings Account (TFSA)

Locked in registered plan (LIRA; LRSP)

Investment Pension Plan (IPP)

Professional Corporations
Holding Companies (HOLDCO)











DIVERSIFICATION STYLES

Growth | Value | Garp | Sector | Responsible Investing Dividend Growth | Dollar Cost Averaging | Real Assets | Infrastructure



PROFESSIONAL MANAGERS

Tenure | Philosophy | Mandate | UN PRI Signatories | ESG integration



TRACK RECORD > 5 YEARS

ALPHA: Investment Selection BETA: market exposure RISK: in style of Investments ESG: integration



WHAT'S YOUR STORY

Financial plan = Individualized Portfolio = Diversification for the Long Term Focus







Investment Advisor

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