

ROCHON FINANCIAL GROUP

## WHY WORK WITH THE ROCHON FINANCIAL GROUP

We deal with a relatively small number of affluent households that are interested in a work optional lifestyle.

- Our focused client base allows us to spend the time necessary to understand what really matters to clients and has led to strong, long-term, and often multigenerational relationships.
- Our team's combined experience of over 65 years has given us the knowledge and expertise to handle our clients ever changing needs.
- John Rochon, who holds the Certified Financial Planner (CFP) designation, develops financial plans to meet our clients' future needs and achieve their work optional lifestyles.
- We have disciplined processes in place to handle all our clients' financial needs including our Rochon Financial Group "Top 20" when investing in individual equities.
- We provide discretionary portfolio management including asset allocation planning, asset selection and placement, rebalancing, and continuous monitoring to save you time and stress and allow you to do the things you want to do.
- Our investment approach has historically generated positive risk-adjusted rates of return.
- We keep in regular contact with our clients by conducting semi-annual reviews and calling throughout the year as investments mature or when other significant decisions have to be made.
- We often work as facilitators with other important advisors in our clients' lives, including accountants, lawyers, and other CIBC partners.
- We offer competitive and flexible fees.
- We have a well-defined succession plan in place. Clients can be confident that the processes we put into place will continue over the long term.

**Ron Rochon, Senior Wealth Advisor, Portfolio Manager | 306 975-3810 | [ron.rochon@cibc.ca](mailto:ron.rochon@cibc.ca)**

**John Rochon, Investment Advisor Associate, Portfolio Manager | 306 975-3822 | [john.rochon@cibc.ca](mailto:john.rochon@cibc.ca)**