What to expect as a new client

1 Client Discovery

1 – 3 weeks

- **Identify Your Goals and Values:** Participate in initial meetings to discuss your financial goals, personal values, and key relationships.
- **Complete a Questionnaire:** Work with us to fill out a detailed questionnaire regarding your current finances.
- **Gather Necessary Documents:** Provide documents listed on our Wealth Planning Checklist (e.g., investment statements, tax returns, estate documents, insurance policies).

2 Initial Account Setup

1 – 3 weeks

- **Sign Account Documents:** Review and sign documents to open new accounts and transfer your assets.
- **Authorize Investment Policies:** Sign the Investment Policy Statement and Managed Portfolio Account forms.
- **Optional CRA Access:** Enroll in the CRA Level 1 Access program to simplify tax documentation.
- **Explore Online Services:** Familiarize yourself with our online portal, statement delivery options, and tax document delivery.

3 Wealth Plan Delivery

1 – 3 weeks

- **Wealth Plan Meeting:** Attend a meeting where we present a comprehensive wealth management plan tailored to you.
- **Implement the Plan:** Execute the action plan, including recommendations on lending, insurance, trust, estate strategies, wills, and powers of attorney.
- **Invest Assets:** Allocate your assets according to the Wealth Plan.

4 Additional Account Adjustments (if needed)

1 week

- **Update Documentation:** Revise account documents based on the Wealth Plan.
- **Sign Updated Investment Policy:** Review and sign the updated Investment Policy Statement.

5 Ongoing Guidance

- **Quarterly Check-ins:** Regular appointments to review your progress and answer questions.
- **Annual Updates:** Yearly updates to your Wealth Plan, ensuring compliance with regulatory requirements.
- **Portfolio Monitoring:** Continuous monitoring and adjusting of your portfolio to stay aligned with your goals.
- **Proactive Advice:** Ongoing recommendations to optimize your wealth.
- **On-Call Support:** Access to a financial support team whenever you need advice or assistance.

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