

# Explore the benefits of professional advice



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## Providing professional advice and peace of mind investing since 1998.

- Your accounts are custom designed and monitored locally. Frequent personal contact with your portfolio manager ensures comfort and control, unlike mass customized, off-shelf investment programs.
- We ensure prompt service and resolve any issues or questions.
- The ability to manage your portfolio on a discretionary basis allows us to make timely changes to your portfolios, unlike laborious, must-call-every-client advice providers.
- We strive to construct and make adjustments to your portfolio to avoid wide market swings, unlike less structured advice providers who rely on a passive buy-and-hold philosophy.
- A transparent, competitive, fee-based structure facilitates full investment flexibility, unlike commission-based advisors with potential for the perception of conflict of interest.
- We employ a process and discipline to make changes to your portfolios, unlike other advice providers who may hesitate to sell an underperforming security, or overlook opportunities.
- Together with our partners at BMO Financial Group we provide seamless investment and banking services to ensure peace of mind for your finances.

