

1 Indications We Are in a Tech Bubble

Bitcoin. Cannabis. It feels like 1998. Remember the tech scramble and how everyone thought they were missing out on an opportunity? Multi-millionaires were being minted on a daily basis. Well, that came to an end in March of 2000 and it took about a decade for the US market to work its way out of the excess that had built up. I'm not saying that today's conditions are the same, but they smell similar to me.

2 Ladies Night Wealth Management Style

We recently hosted a "Ladies Only" client workshop and it was not only a success, but the first in a series of ladies only events for 2018. It was great for us to have an open dialogue with attendees and hear what keeps them up at night. The key takeaway for us is that clients would appreciate more of these workshops and that the event made them feel less alone. Check back for our next event.

3 More Than Colours on a Screen

Adding to our portfolio is about more than tagging along with the latest fad, trend or hot tip. It's about really understanding some fundamental truths and finding a management team that is good at what they do. So when we add to our portfolio, we talk to the founder, some of their management group, and visit their location to get a sense of what they're building.

**IT'S STARTING TO
SMELL LIKE 1998.**



READ MORE ON OUR LINKEDIN

**BY ROBERT CHALANCHUK
PORTFOLIO MANAGER**

WE MAKE INVESTING PERSONAL

We believe that you should be free to follow your passion in business or life, to spend precious time with the people who matter the most to you. You should be able to do this, knowing your financial future is secure and your family is looked after.

READY TO CHAT?

CHALANCHUK.COM

604 443 1578

ROBERT.CHALANCHUK@NBPCD.COM

OUR UNIQUE INVESTMENT STRATEGY

We offer a high-performance approach to investing. Using our unique qualifications as a Portfolio Manager, we build and manage a strategic fund that is constantly monitored, evaluated and adjusted to deliver optimal performance. With 100% transparency, we put our money where our mouth is by personally investing in our own model.

FINANCIAL PLANNING WITH HEART

We start by getting to know you. Our in-person meeting is where we truly uncover what matters the most to you. We craft a strategic financial plan that shows you, step-by-step, how we can take you from the island of uncertainty to the island of peace of mind.

OUR MULTI-DISCIPLINARY SERVICES

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