

**Portfolio** Review.



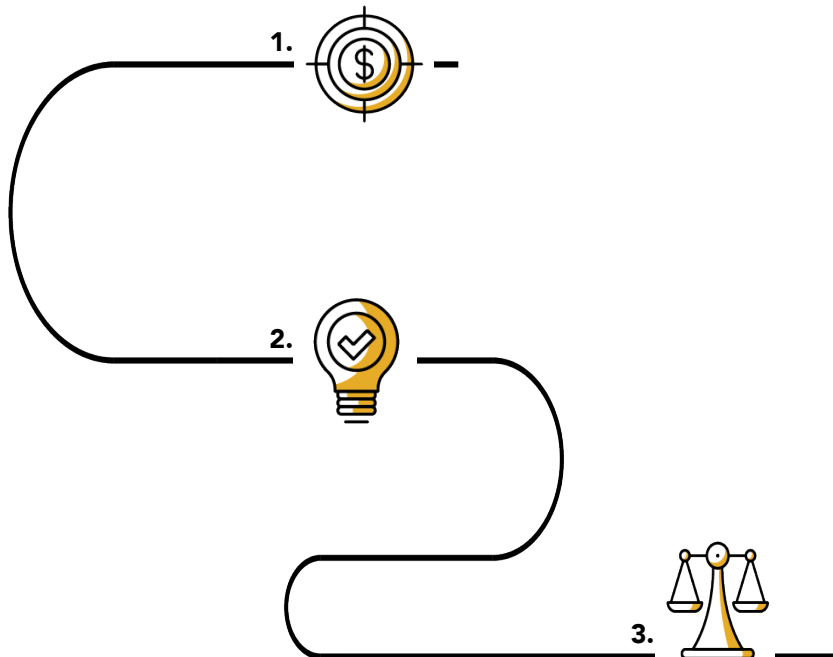


## Portfolio Review.

If you've ever had questions about your investment portfolio, you're not alone. You worked hard for your money and want to do what's best to protect and grow your wealth. With this in mind, we developed the Portfolio Review.

The Portfolio Review includes a 3-step process designed to give you confidence that your investment portfolio aligns with your goals and objectives, and results in the satisfaction that your questions and concerns have been answered.

- Am I taking more risk than I need to?
- Stock market volatility concerns me, what options do I have?
- Are there other investment opportunities I could be taking advantage of?



### Identify.

In the first step, we will identify and provide you with a consolidated summary of your current investments, fees and other potential charges to help you better understand what you own and what you're paying for.

### Evaluate.

In step two, we will discuss your investment needs, goals, and objectives and evaluate if your portfolio is aligned with your planning needs.

### Manage.

In step three, we will explore opportunities and make recommendations to help ensure your investment portfolio is on the right track to meet your investment needs, goals, and objectives.

### Whats in it for you.

- Asset Allocation Summary - Consolidating all of your investments in one place to highlight your exposure to specific asset classes.
- Current Fee Summary - Helping you better understand investment fees and other potential charges.
- Professional Planning - An integrated team of specialists looking out for your best interests.

You worked hard to grow your wealth and deserve the comfort of knowing your wealth is working for you. Our portfolio review service can help ensure you are making the best choices for you and your family.

### Contact Simon Wong to book a portfolio review.

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