Wealth Management
Dominion Securities

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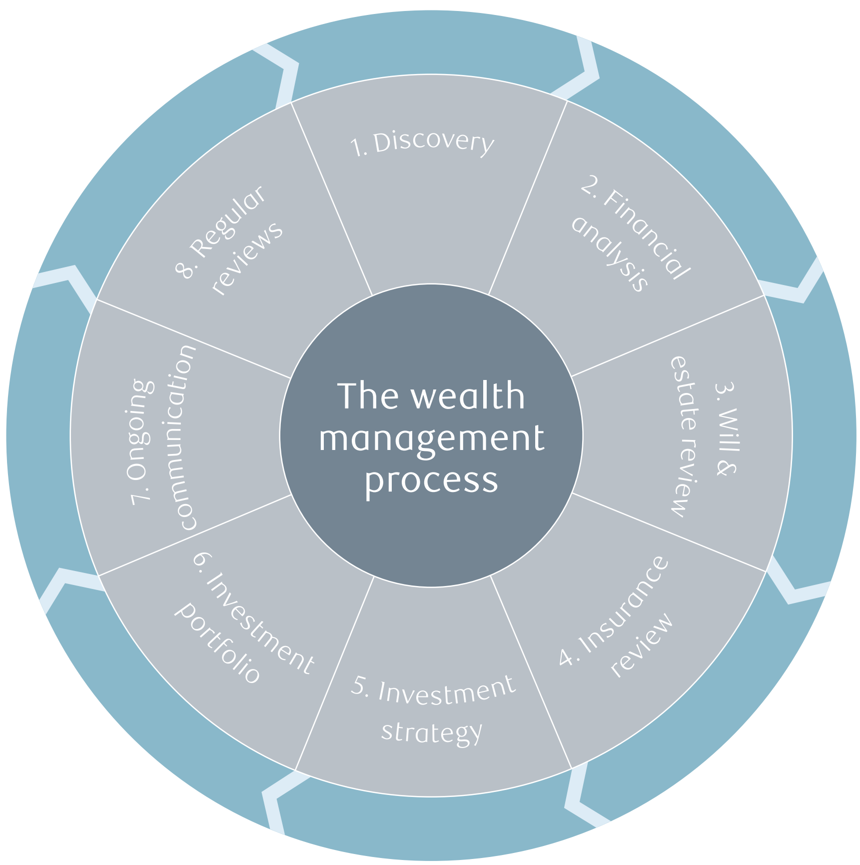
The wealth management process

Our wealth management process was developed to provide a comprehensive plan that takes into account both your personal and financial goals. Your plan will be tailored to your unique objectives and can evolve over time to help ensure that it remains an effective tool to achieve your goals.



For more information about our wealth management process, please contact us today.

1. Discovery

We will sit down with you to gain a clear understanding of your goals – both personal and financial.

2. Financial analysis

We will prepare a customized analysis of your financial situation that incorporates your financial goals, risk tolerance and long-range plans.

3. Will & estate review

If you have a more complex estate, we can help you address your various estate planning concerns and recommend the steps you need to take to achieve your goals.

4. Insurance review

We can introduce insurance-based solutions to help you protect everything you have worked to build.

5. Investment strategy

We will help you establish an investment strategy designed to achieve your goals, whether you're investing for growth, income or preservation.

6. Investment portfolio

Next, we implement your investment strategy within your custom-designed portfolio.

7. Ongoing communication

You are apprised of the performance of your portfolio and the markets through regular updates, including a quarterly statement, annual tax package and secure access to DS Online, featuring exclusive research, real-time quotes, Watchlists and more.

8. Regular reviews

As your needs and the markets evolve, periodic portfolio reviews help to ensure that your plan remains an effective tool to achieve your objectives.