



THE CHARTERED PROFESSIONAL (Ch.P.) STRATEGIC WEALTH

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*collective wisdom – inspired prosperity*

# LEADERS IN WEALTH MANAGEMENT

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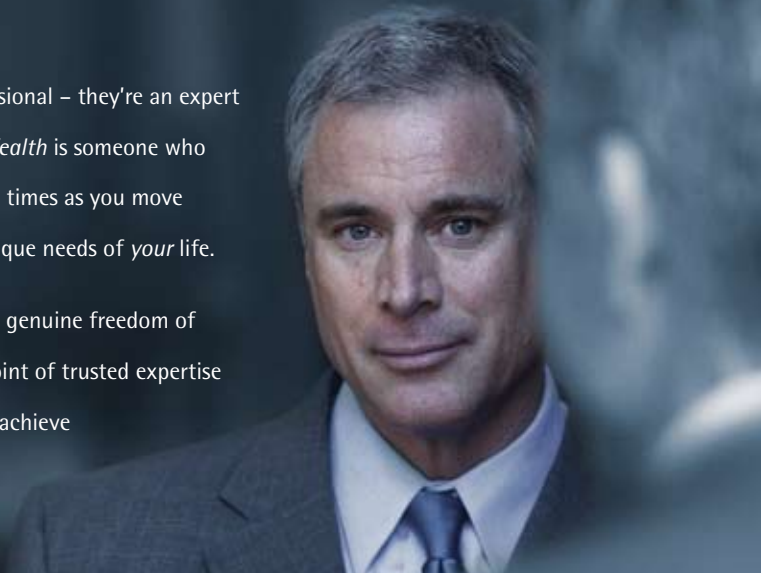


## A NEW ERA OF WEALTH EXPERTISE



Your Ch.P. *Strategic Wealth* is more than just another financial services professional – they're an expert in lifecycle advising. What does this mean? Simply that your Ch.P. *Strategic Wealth* is someone who understands the importance of making the right strategic choices, at the right times as you move through life's different stages – choices that have been made based on the unique needs of *your* life.

*Strategic wealth* is the highest form of wealth management, and your path to genuine freedom of choice and peace of mind. Your Ch.P. *Strategic Wealth* will serve as a single point of trusted expertise who will connect your personal finance, investments and security to help you achieve life-long financial wellbeing and prosperity.



## BUILDING TRUST THROUGH WISDOM, INTEGRITY AND ETHICS

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Earning this leadership designation means meeting rigorous experience requirements and completing an extensive education.

In most cases, a Ch.P. *Strategic Wealth* will:

- already hold at least one other financial planning designation.
- have a minimum of three years experience meeting client needs.
- have a proven knowledge of the four stages of lifecycle wealth management; accumulation, preservation, conversion and transfer.
- have agreed to meet demanding continuous education requirements.
- have agreed to adhere to the objectives and beliefs outlined in the Charter of Strategic Wealth Professionals and in the Code of Ethics and Standards of Professional Conduct.

These requirements and more make the Ch.P. *Strategic Wealth* one of the most difficult designations to achieve and maintain. But they also make it one of the most credible. Every Ch.P. *Strategic Wealth* has taken the long and difficult road to build the advanced expertise and knowledge required to effectively manage your wealth and build your prosperity.

## CHOOSE A Ch.P. *Strategic Wealth*

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- Simplify your investment goals by integrating every aspect of your financial life.
- Build a lasting relationship – every Ch.P. *Strategic Wealth* is trained to offer life-long advice and service from first investments to estate planning.
- Work with one expert, yet have access to a network of professional specialists.
- Be confident knowing your advisor has completed one of the most rigorous education paths in Canadian wealth management.

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**About CSI** – Founded in 1970, CSI has helped more than 500,000 financial professionals earn their credentials through our courses and programs. For more information visit [www.csi.ca](http://www.csi.ca).

## DETERMINING WHO IS A Ch.P. *Strategic Wealth*

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You can ensure that your advisor is a Ch.P. *Strategic Wealth* in good standing by visiting [www.csi.ca](http://www.csi.ca).



## THE CHARTER OF STRATEGIC WEALTH PROFESSIONALS

*Strategic Wealth* is the highest state of continuous, blended wealth management. It is the process and the means by which a person gains genuine freedom of choice and peace of mind. It establishes a single point of designated expertise – the Chartered Professional (Ch.P.) *Strategic Wealth* – who connects personal finance, investments and security to foster life-long financial wellbeing and prosperity.

### Our Purpose...

- (1) To optimize the whole financial wellbeing of our clients; learning from the past to earn trust in the present and build security for every possible future.
- (2) To harmonize the individual segments of personal wealth in both education and practice.
- (3) To apply real financial science and continuous learning in building, preserving and distributing wealth.
- (4) To achieve these goals within a code of conduct that demonstrates the highest possible ethics, sensitivity and personal service.
- (5) To meet the most rigorous proficiency standards in wealth management as established by industry leaders, advisors and the financial academic community.

### Our Promise...

To know more, to know better – to be informed, to prove the ideal. To be without bias – and so be worthy of personal trust.

### Our Character...

*Quality is never an accident; it is always the result of high intention, sincere effort, intelligent direction and skillful execution; it represents the wise choice of many alternatives.* Total quality is our character – it is the new standard as set by Chartered Professionals in the practice of *Strategic Wealth*.

WISDOM - INTEGRITY - PARTNERSHIP - CLIENT INSIGHT