The Wealth Management Process

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Fanara Wealth Management Group

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Comprehensive wealth management solutions

Put the resources and expertise of Canada's largest provider of wealth management services to work for you. Please call today to learn how we can help you grow, manage and protect your wealth.





REGULAR REVIEWS As your needs and the markets evolve, periodic reviews ensure that your plan remains an effective tool in achieving your objectives.



ONGOING SERVICES You are apprised of the performance of your portfolio and the markets through regular updates, client events, newsletters and our website.

INVESTMENT PROPOSAL



Before implementation, your objectives will be reviewed and we will outline an investment plan created for you. Once approved, the recommendations are put into place.



INVESTMENT POLICY STATEMENT (IPS)

The blueprint for your investor profile, the construction of your portfolio and customized Investment Policy Statement.







WILL & ESTATE REVIEW

DISCOVERY

Your personal advisor sits down with you to gain a clear understanding of your goals – both personal and financial.

FINANCIAL PLANNING

customized analysis of

your financial situation

We will prepare a

incorporating your

financial goals, risk

tolerance and long-

range plans.

We can help you address your various estate planning concerns and recommend the steps you need to take to achieve your goals.

INSURANCE REVIEW

Our insurance specialist can help you protect everything you have worked so hard to build through innovative insurancebased strategies.





RBC Wealth Management Dominion Securities

Professional Wealth Management Since 1901



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