



Wealth Management
Dominion Securities

Pattern for Success (D³P.I.M.)

Semenchuck Barnard Family Wealth Group

**Semenchuck Barnard
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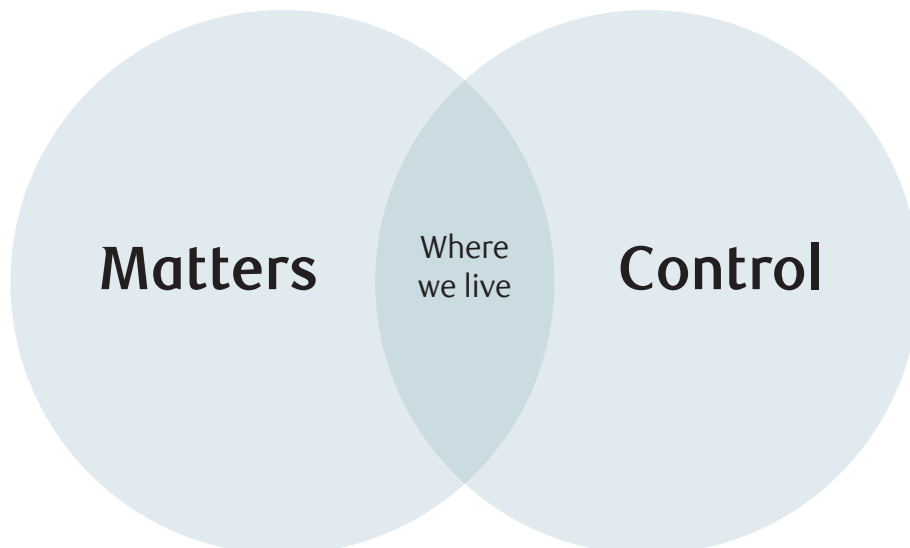
What follows is our pattern for success for our clients, D₃P.I.M.¹.

- 1. Discovery - In-Depth Wealth Management Discovery (WMD) of family**
 - i. Past – where did it all start; family history/heritage
 - ii. Life transitions – what decisions made along the way; guiding values/patterns
 - iii. Present – where at today; who are people and things important to you
 - iv. Future – where want to end up if could snap our fingers and make it so
- 2. Propose – mutual fit – self-motivation (an inside job) – Your plan for you**
 - i. Learn – behavioural financial literacy, family enterprise advising, multi-generational stewardship; multi-disciplinary philosophy
 - ii. Engage – bilateral communication, challenge, seek to understand/be understood
 - iii. Act – take action on your planning long-term priorities rather than react to temporary events du jour
 - iv. Value – appreciate value of all brought to table by everyone
 - v. Advocate – actively give others the same opportunity that you have
 - vi. Have fun – this is a life-long magical evolution and there will be swings n' roundabouts along the way
- 3. Implement - Start the activity**
 - i. Plan – balancing content and process, work with you to assimilate your WMD story into a plan that is about and for you
 - ii. Process – Wealth Management; Behavioural/Financial Education; Family Enterprise Advisory; Risk Management; Estate Management; Debt Management; Tax Management
 - iii. Prioritize – identify top three priorities; agree action plan; implement; complete; next three priorities
- 4. Monitor – personalized communication plan**
 - i. Accountability to plan
 - ii. Adjust as needed
 - iii. Help you navigate complex family wealth options
 - iv. Collaborate and communicate with your other advisors

¹Discovery/Design/Deploy (D₃), Propose, Implement, Monitor

²A plan that is about you ...that does not include you ...is not for you

The beauty of our process, is that we ensure that we never lose sight of the two essential elements of achieving financial independence.



Why
Family
Occupation
Recreation

Financial
Intellectual
Social
Spiritual
Human

Discovery/Design/Deploy
Philosophy
Planning
Process

How
Money



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