



Wealth Management  
Dominion Securities

# Discovery Meeting

## Getting to know you and your financial story

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### Please be prepared with:

- Recent bank & investment statements
- Your most recent year's tax filing for reference
- A general idea of income and expenses (and in retirement, if pending)
- Pension statements (if applicable)
- Insurance policy (if applicable)
- Any questions you may have!

## What you can learn in a Discovery Meeting

We will focus on YOU and your needs to see if your current financial plan makes sense for your future. During an hour by phone or online I will:

- Look for missed planning opportunities (this could be tax, estate planning, or portfolio choices)
- Ensure you are on the right track for a successful retirement
- Give you a professional, unbiased opinion and explore a full menu of options available based on my access to nearly all investment and insurance products
- Review your current service level. Paying a reasonable fee makes sense *only if* you are receiving value for that fee.

We will also spend time on portfolio management. I will:

- Highlight any red flags among your portfolio choices
- Analyze asset allocation and whether it matches your risk tolerance
- Take a close look at tax efficiencies in your various accounts
- Review the *current* costs of running your portfolio, including embedded or hidden fees

## Your only commitment is time.

Any future engagements will be at your discretion.

If you require more information, don't hesitate to contact myself or my associate advisor Una Guile. We can be reached at:

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