Wealth of Life

Wealth Management
Dominion Securities

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Now that most of us may have just finished spring cleaning and are now transitioning into the warm days of summer, it feels like a good time to think about organization at home and financially. Just as we might be getting into our gardens and tending to it one plant at a time, we can relate this to our approach to looking after our financial documents, one step at a time with similar care.

We recommend a first step would be to get a copy of our Family Inventory guidebook. This will help you gather a comprehensive list of all information related to your family's financial status and you will find it useful when updating or creating your financial and estate plan with us. It will help you take a step back and look at your overall financial situation and ensure you have considered all aspects of your family's financial affairs. We are happy to share this Family Inventory document electronically or in a printed booklet to help get you started. Once you have completed the guidebook, we would then recommend reviewing your important documents such as Wills, Power of Attorneys, insurance policies, and financial plans. During our next review, we will set aside time to review your financial goals and cash-flow with us to ensure you are on track to meet your long term objectives.

Taking these steps one at a time, much like nurturing a garden, will help you achieve better financial organization and health.

In this *Wealth of Life* issue, we offer insights on virtual training opportunities for business growth, including Business Growth Programs from Commit 2 Growth, Tim Fawcett and Don Hache.

We are also proudly celebrating a remarkable 20-year milestone for Angela Stuart this year with our team, and Ryan BeLong is sharing one of his favourite appetizers – "Buffalo Chicken Dip" – a hit at any gathering.

Lastly, we are featuring a podcast called Matters Beyond Wealth, which focuses on estate planning, and healthy aging, along with some resources for those entrusted with the role of executor.

Wishing you all a great summer season and hope you enjoy this issue of *Wealth of Life*.

Jessica

Business growth programs

Scale, grow, acquire and exit on *your* terms!

We understand that scaling and growing your business can be challenging and we are sharing some information on business growth programs offered by Commit 2 Growth that are designed for companies who would like to learn with their teams and to empower your leadership teams with the tools, knowledge and support they need to thrive in a dynamic business environment. There are a few different programs that may be of interest and we hope it would bring great value to clients who are interested in growing and preparing for succession. Good CEOs/business owners learn with peers, great CEOs/business owners learn with their leadership team in peer groups.

Scale up

Want to scale up your potential and learn with your teams? Join one of our 12-week Virtual Training Sessions Cohorts delivered by certified Scaling Up Coaches. Designed for company leaders looking to interact with like-minded peers in an environment that drives innovation and creative thinking.

Grow up

Leadership involves empowering others to lead. In a functional leadership model, success doesn't rest on one person but rather on the functional behaviours of the group. This program is designed for entrepreneurs and executives who are not afraid to be challenged and encouraged by their colleagues.

Exit ready

Mergers and acquisitions offer a key lever to propel your company's growth and exceed the competition on economic performance. Our CEO roundtable curriculum covers the winning strategies and real world experience that exit coaches use for every successful business exiting project – by making your company sellable.

COMMIT 2 GROWTH
A division of Selltron Group & EastWind Business Solutions

Locations:

Moncton, NB	1 506 872 2900	tim.fawcett@c2g-inc.com
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Congratulations Angela Stuart, on 20 years with Tingley Mahoney Cyr Group!

Please join the entire Tingley Mahoney Cyr Group in congratulating Angela Stuart, Team Operations Manager, on her 20-year anniversary with our team.

She joined us in 2004, and over two outstanding decades, has been a familiar, caring and reliable face in our office. Colleagues and clients alike value Angela's welcoming presence, her attention to detail and the strong relationships she's forged over the years.

Prior to her current role, Angela worked as an Investment Representative at the RBC Contact Centre in Moncton, after graduating from NBCC Moncton with a business diploma in marketing. In addition to her responsibilities as Team Operations Manager, Angela also coordinates all team events and liaises with branch management for all daily administrative, human resource and compliance matters while overseeing the implementation of any head office projects.

We'd like to thank Angela for all of her hard work and dedication. This tremendous milestone marks two decades of her commitment to excellence and significant achievement in the business. Congratulations, Angela!

BUFFALO CHICKEN DIP RECIPE

Submitted by Ryan BeLong

Ingredients

- 2 cups (500 mL) cooked and shredded chicken breast
- 1 block (8 ounces/225 g) cream cheese, softened
- 1/2 cup (125 mL) Frank's RedHot sauce (adjust to taste for desired spiciness)
- 1/2 cup (125 mL) ranch dressing
- 1 cup (250 mL) shredded cheddar cheese, divided
- Optional: additional shredded cheese for topping
- Optional: sliced green onions for garnish

Directions

1. Preheat oven to 350°F (175°C).
2. In a mixing bowl, combine softened cream cheese, Frank's RedHot sauce, ranch dressing and 1/2 cup of shredded cheddar cheese. Mix until well combined.
3. Add the shredded chicken to the mixture and stir until the chicken is evenly coated.
4. Transfer the mixture to a baking dish and spread it out evenly.
5. Sprinkle the remaining 1/2 cup of shredded cheddar cheese on top of the mixture. If desired, add extra shredded cheese for an even cheesier topping.
6. Bake in the preheated oven for 20 to 25 minutes, or until the dip is heated through and the cheese on top is melted and bubbly.
7. Remove from the oven and let it cool slightly before serving.
8. Garnish with sliced green onions if desired, and serve warm with tortilla chips, celery sticks, or your favourite dipping accompaniment.

Enjoy your delicious Buffalo Chicken Dip!

Matters Beyond Wealth podcast

Estate planning, healthy aging and wealth insights

Hosted by Leanne Kaufman, president and CEO of RBC Royal Trust, Matters Beyond Wealth focuses on estate planning, healthy aging and wealth insights to help Canadians plan for today and their future.

Artie, the executor helper™ — Your guided executor checklist

Being an executor of a Will can be difficult. A free Artie account can help with understanding your role and responsibilities as an executor, and includes a detailed list of tasks, a dashboard to track your progress, and access to key prepopulated letters to help you in the estate settlement process.

If you feel burdened by the tasks of settling an estate, or simply lack the time or expertise to undertake your executor role, we are here to help. We are committed to providing you with strong, knowledgeable support, assuming as many or as few of the administrative tasks as your personal situation requires by introducing you to our colleagues at RBC Royal Trust.

RBC Royal Trust offers an agent for executor service that offers personalized and customizable support to address the range and complexity of your needs as executor. We recognize that every situation is unique, and offer specific services to help executors fulfill their numerous legal, financial, and administrative duties when settling an estate, while handling stressful family situations with compassion and objectivity. Having a professional at your side during estate settlement can provide welcome assistance during a challenging time.

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