



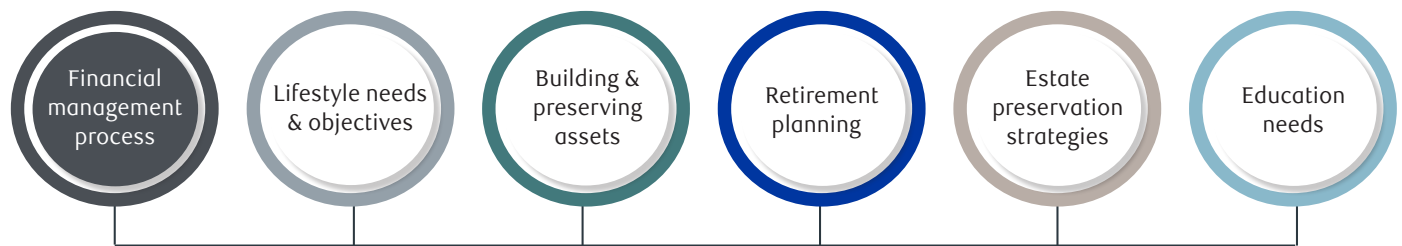
Wealth Management
Dominion Securities



Financial management process

Joseph Sardo, BA, CFP, CIM
Senior Portfolio Manager & Wealth Advisor

First, Joe will help you clarify and prioritize your needs and goals.

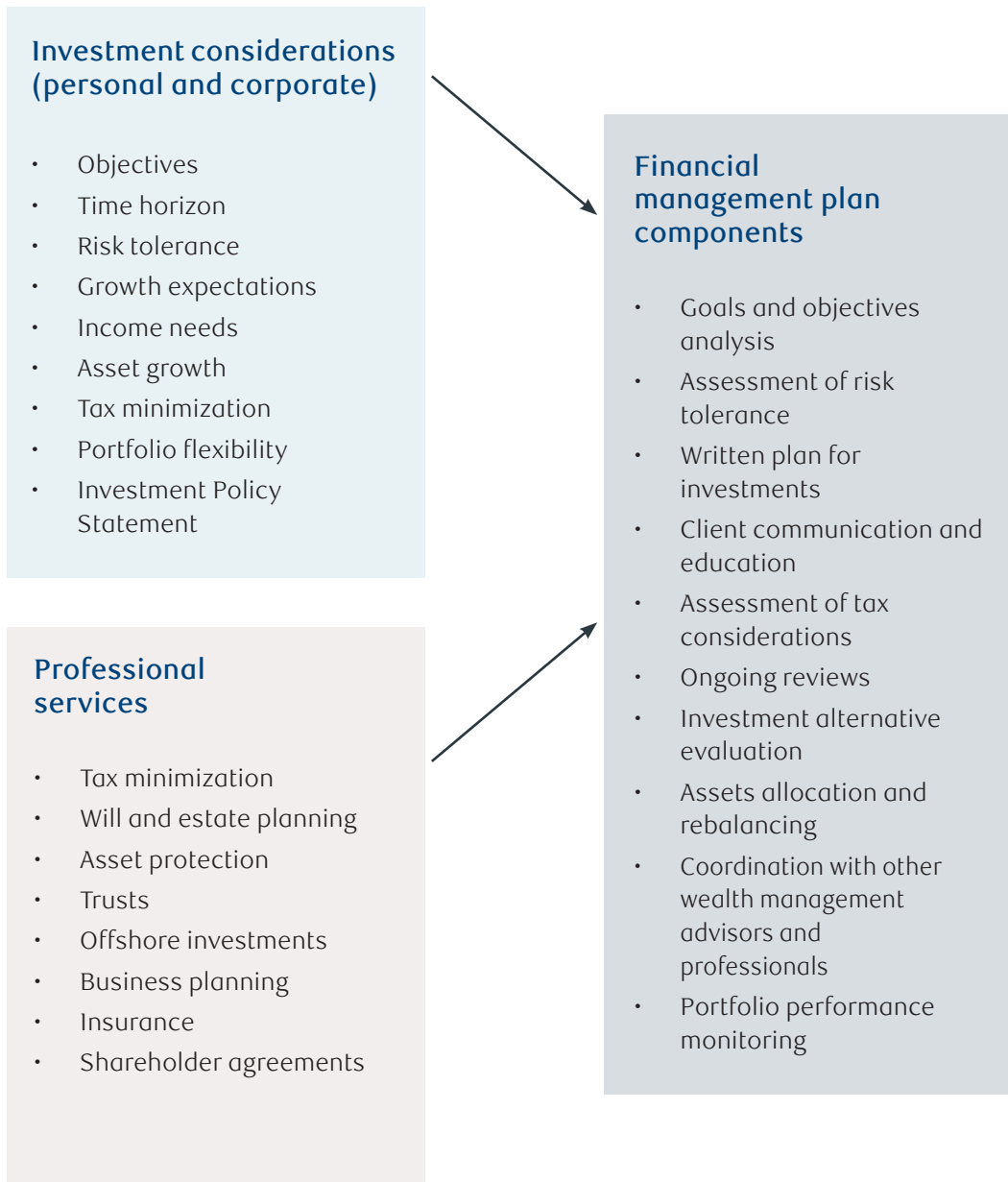


Needs analysis
Investment | Family | Lifestyle | Retirement | Insurance | Education



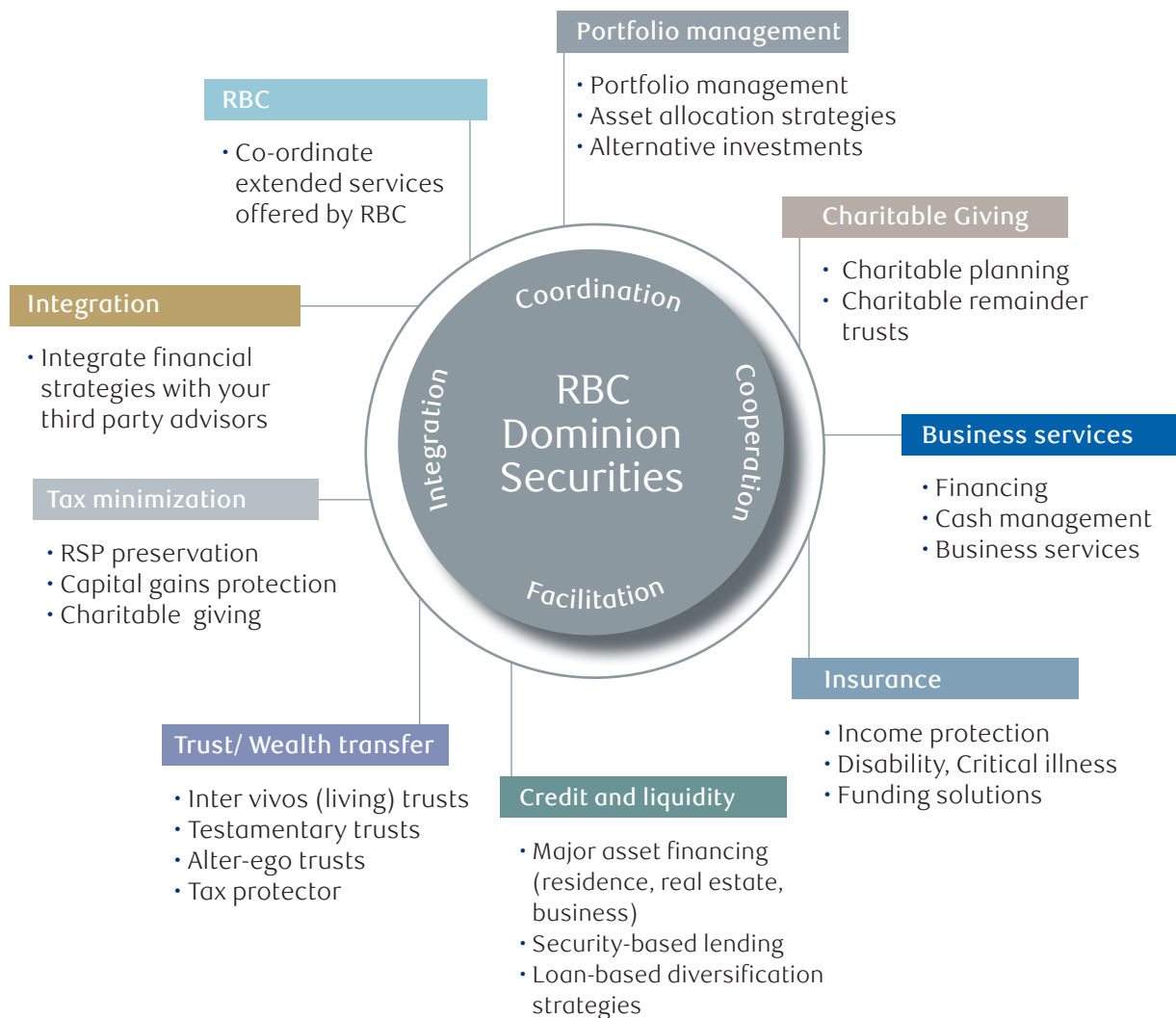
- ### Financial life management
- Giving more to your favourite charity
 - Leaving a lasting legacy for your family
 - Keeping heirlooms in the family
 - Building and preserving assets
 - Retirement planning
 - Funding a child or grandchild's education
 - Caring for aging parent(s)
 - Preserving your wealth and minimizing taxes
 - Structuring your Will
 - Meeting liquidity needs
 - Preparing for untimely illness, disability or death (income replacement)

Once we have an accurate assessment of your financial and lifestyle needs, Joe will create your personal financial management plan.



Coordinating your financial landscape

We can assess and monitor your financial landscape at every step.



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