

Pre-Appointment Kit 3

Introduction to Our Team

[Advisor] has brought together a team of specialists to ensure [his/her] clients receive efficient, expert and friendly financial planning advice and servicing.

[Advisor]

Financial Advisor

As your Financial Advisor, [Advisor] will coordinate the financial planning process for you. [Advisor] will help you to identify your goals and he will work with you to implement a series of strategies that will help you to realize your vision for the future.

[Assistant]

Administration/Client Service Manager

[Assistant] ensures that our clients receive the best possible service. She will book appointments for you and is the first person you should call if you have any questions about your financial planning process. She will ensure that the appropriate member of our team responds to your query.

[Name of Additional Team Member]

[Title]

Include a brief description of everyone on your team.

Our Other Professional Resources

Because your financial situation is often complex, [Advisor] typically works directly with other professionals to design and implement the strategies that will help you to achieve your goals. He relies on a network of professionals who provide technical advice as required.

The professionals [Advisor] works with include (insert as applies):

• Estate Lawyer • Certified Public Accountant • Mortgage Broker • Real Estate
(Commercial and Residential • General Insurance

