T·E·WEALTH
T.E. FINANCIAL CONSULTANTS LTD.

Wealth Management

For more than 35 years, T.E. Wealth has provided high net worth individuals and their families, employers and employee groups, and institutional managers with objective, FEE-ONLY™ financial advice and education. The term FEE-ONLY was trademarked by company founder Timothy Egan and demonstrates our longstanding commitment to independent advice and client service. With offices across Canada, T.E. Wealth is a national company, delivering services to clients through our partner companies – T.E. Financial Consultants Ltd. and T.E. Investment Counsel Inc.

Comprehensive Service Offering

Our client-centered approach to wealth management means that we focus on you – your aspirations, goals and lifestyle choices, to construct a customized wealth-management solution. Our fundamental point of discrimination from other financial institutions is the all-inclusiveness of our services and expertise. Your plan may involve a customized selection, or all of the following services:

- Financial Planning
- Investment Management
- Career transition financial analysis and planning
- Tax management and preparation
- Insurance review and planning
- Stock option exercise programs
- Retirement planning
- Inheritance and estate planning
- Charitable gift and legacy planning
- Financial analysis and planning through separation and divorce
- Managing a financial 'windfall' (inheritance, stock options)
- Health crisis-related financial planning and management

Our Unrivalled Process for Wealth Management

Your wealth management plan benefits from the expertise of a financial consultant and investment counsellor working together to provide effective management. Together, these seasoned professionals, backed by a strong support team, oversee your entire financial file.

Financial and Investment Analysis

Through an intensive interview process we develop an in-depth profile of your overall financial situation. If you are in transition or anticipating a significant change in your life, we assess the impact on every aspect of your finances.

Personalized Strategy

Drawing upon the depth of our in-house financial expertise, we deliver a personal wealth management plan covering everything from protecting your current position to building and preserving your accumulated assets.

Investment Policy Statement and Portfolio Selection

With the wealth management plan in place, your investment counsellor develops your personal Investment Policy Statement to define your investment objectives and state the rules, constraints and guidelines that dictate our actions.

More than Reporting

In addition to regularly scheduled update meetings and quarterly portfolio reporting, advice and support are just a phone call away. We constantly reassess your financial situation to anticipate your needs and respond to your life changes. We call you.

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As a leading provider of financial advice to corporate executives, T.E. Wealth has grown to provide investment advice and financial planning to high net worth individuals and their families. Unlike broad-based financial institutions who define themselves primarily through the range of financial products they sell, we base our style on the following fundamental business practices:

We are committed to independent advice.

Our FEE-ONLY™ platform ensures your strategy is not designed to generate commissions or sales' fees. Our consultants are salaried and their advice is based solely on your best interests. We ask the right questions, investing time in understanding you and your life goals to develop a plan together that makes sense today and into the future.

We offer customized investment solutions.

You receive a customized investment policy and portfolio strategy based on your needs. Our investment philosophy blends styles and managers, aiming for superior returns with lower volatility and fewer surprises. You have access to investment opportunities and fees available from institutional money managers. In addition, clients can benefit from the significant tax efficiencies available through our FEE-ONLY™ structure.

We advise on every aspect of your financial affairs.

Under the T.E. Wealth banner you can receive comprehensive advice and management on every aspect of your financial portfolio. We also can help you achieve seamless management by coordinating the involvement of external service providers to ensure fluidity between your objectives and more detailed financial arrangements.

To learn more about T.E. Wealth's Wealth Management and Strategy please contact:

Vancouver
Suite 720
475 West Georgia Street
Vancouver, BC V6B 4M9
Tel: (604) 684-2196
Fax: (604) 684-2396

Calgary
Suite 2230
700-9th Avenue S.W.
Calgary, AB T2P 3V4
Tel: (403) 233-8370
Fax: (403) 262-8789

Toronto
Suite 710
26 Wellington Street E
Toronto, ON M5E 1S2
Tel: (416) 366-1451
Fax: (416) 368-9801

Montreal
Suite 2100
2020 University Street
Montreal, QC H3A 2A5
Tel: (514) 845-3200
Fax: (514) 845-9944

www.tewealth.com