



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. Our consultants' loyalty and years of service are a point of pride at T.E. Wealth, having brought consistency and stability to our clients over the years. 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.

Key Employee Financial Management

T.E. Wealth has a long tradition of successfully partnering with corporate Canada to ensure benefit and compensation packages for their key employees distinguish their organizations. Our customized programs make sure your most critical resources – talent and time – are protected. As a valued part of a total compensation package, our programs provide key employees with specialized expertise that helps them manage all facets of their compensation and meet their personal financial, lifestyle and retirement goals.

Maximize your employees' focus on the bottom line

T.E. Wealth's financial management program helps employees better manage their personal financial affairs, allowing them to stay focused on your business. Our comprehensive approach means that we are there to help your employees respond to the inevitable life changes throughout their career, delivering the peace of mind that comes with knowing their financial goals are being managed by a team of financial professionals.

Retain key employees

We understand the motivators for highly-skilled individuals who are in great demand. While your company may have an enriched benefit package that favorably compares with other employers, our financial management program provides a unique point of discrimination from other employers.

Attract the best

Our expertise can provide you with the competitive edge to reach the best and brightest employment candidates. As a best-in-class employer, you understand that complex compensation packages require financial expertise and management to maximize their value. Our T.E. Wealth consultants act as personal advisors on all financial matters to your employees, ensuring the full benefit of your compensation package is realized.

Beyond a rate of return

While we offer your employees independent investment review and analysis, our primary concern is to help them understand the entirety of their financial worth. We review all their goals and aspirations, challenges and responsibilities and then build the financial foundation to begin the life-long process of sound financial management.

Comprehensive Services Available to Your Key Employees

Comprehensive Financial Planning

- Personal goal setting
- Tax planning
- Investment planning
- Stock option planning
- Insurance planning
- Retirement planning
- Estate planning
- Income tax return preparation

Transition Services (*event-driven planning*)

- Retirement counselling
- Survivor counselling
- Outplacement counselling

International Advisory Services

- Entering or leaving Canada
- Canadian and U.S. income tax
- Equalization arrangements

Investment Counselling

- Investor needs analysis
- Manager selection
- Portfolio monitoring and rebalancing
- Manager evaluation and replacement where appropriate
- Portfolio administration

Our Unparalleled Approach

Your key employees can expect:

- An experienced, personable financial consultant whose primary objective is to understand, educate and guide your employee to ensure successful financial management over the long term.
- An investment counsellor who works in concert with their T.E. Wealth financial consultant to advise and manage on all aspects of investments including those related to stock options and other unique offerings.
- A realistic and efficient process and a personal, individualized approach that is above and beyond their experience with broad-based financial institutions
- Relief from the nagging worries, during their peak earning years, that they have neither the time nor the expertise to realize their personal life goals.

To learn more about T.E. Wealth's Key Employee Financial Management please contact:

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