The Alan Rae Wealth Management Process

FIRST STEPS

Will & Estate Review – Aileen LaBorie

› Aileen can help you address your various estate planning concerns and recommend the steps you need to take to achieve your goals.

Insurance Review – Matthew Leggett

› The team's Insurance Specialist can help you protect everything you have worked so hard to build through innovative insurance-based strategies.

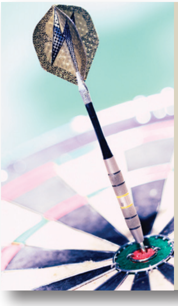
Investment Policy Statement – Alan Rae

› The blueprint for the construction of your portfolio, your individualized Investment Policy Statement documents both your financial circumstances and profile as an investor.

Financial Planning – Heather Baker

› Heather will prepare a customized analysis of your financial situation incorporating your financial goals, risk tolerance, and long-range plans.

FOLLOW UP



Investment Proposal – Alan Rae

› Before implementation, Alan will review your objectives and outline the investment plan he has created for you. Once approved by you, the recommendations are put into place.


Louise Fry


Penny Yuan

Ongoing Service – The Alan Rae Wealth Management Team

› You are apprised of the performance of your progress and the markets through regular updates, client events, newsletters and the team's website.

Regular Reviews – The Alan Rae Wealth Management Team

› As your needs and the markets evolve, periodic reviews ensure that your plan remains an effective tool in achieving your objectives.

Bringing in the Experts – The Alan Rae Wealth Management Team

› The team's extensive professional network is at your disposal to assist you in meeting your non-financial needs.

Professional Wealth Management Since 1901

RBC Dominion Securities