ACCELERATE

T·E·WEALTH

Your life. Your legacy.

Accelerating
your
financial goals
requires
partnering
with the
right name.

SUCCESSFUL WEALTH MANAGEMENT COMMANDS A 360° VIEW.

Successful wealth management involves much more than simply focusing on investments. An effective wealth strategy should consider every facet of one's financial picture and life goals.

For more than 45 years, T.E. Wealth has provided individuals, families and companies with a transparent approach to total wealth management. We specialize in financial planning and investment management including estate planning, philanthropy, asset protection and tax efficiencies for a truly focused 360º financial view.

You have worked hard to build your wealth. Now you're ready to accelerate it to the next level. Talk to us. Our holistic wealth management solutions consider every aspect of your financial picture in order to accelerate you further. Ready to soar? Give us a call.

Corporate Clients

Well-managed companies tend to outperform their competitors. That's why we employ a top-to-bottom approach that addresses the business, the senior executives and the company employees – all in alignment with corporate strategy.

Business Planning:
Good governance is vital to a company's success and reputation. We provide firms with proactive risk management solutions to ensure their legal obligations are wholly met. We help plan for:

- Cross Border Taxes
- Charitable Support
- Regulatory and Reputation Risk
- Succession Planning

Employee Financial Education:
Financial education isn't simply empowering; it also provides reassurance that one's life goals are within reach and on track. We help employees fully understand their benefit and pension programs through digital tools and onsite workshops, seminars and one-on-one financial planning. These cover:

- Financial Basics
- Investment Planning
- Retirement Planning
- Tax Efficiencies

Senior Executive Consulting:
Attract and retain the executive-level talent you seek most, by including invaluable guidance on finances, taxes, investments and more as part of the company's benefits package. Our one-on-one counselling delivers customized financial planning and tax management for senior executives – throughout their career and into retirement. We offer:

- Benefit and Compensation Planning
- Stock Option Analysis
- Estate Planning
- Tax Planning and Preparation
- Risk Management
- Insurance and Annuity Reviews
- Investment Planning
- Wealth Transfer Strategies
- Retirement Planning
- Survivor Counselling
- Transitional Counselling

Private Clients

T.E. Wealth specializes in clients who have accumulated significant wealth, providing comprehensive financial planning and investment analysis through regular meetings and quarterly portfolio reviews. Our customized strategies plan for all of life's milestones and evolve with you, as you continue to grow your legacy. We advise on:

- Financial Planning
- Investment Management
- Career Transition Financial Analysis and Planning
- Tax Planning and Preparation
- Insurance and Annuity Reviews
- Inheritance and Estate Planning
- Legacy and Charitable Gift Planning
- Financial Analysis and Divorce Planning
- Retirement Planning
- Managing Financial Windfalls

Indigenous Services

T.E. Wealth has built trusted and loyal relationships with First Nations, Metis and Inuit communities based on traditional values. Our dedicated Indigenous Services experts work with leadership, trustees and community officials to provide independent and objective support, with a focus on helping communities build for today and in to the future. We offer:

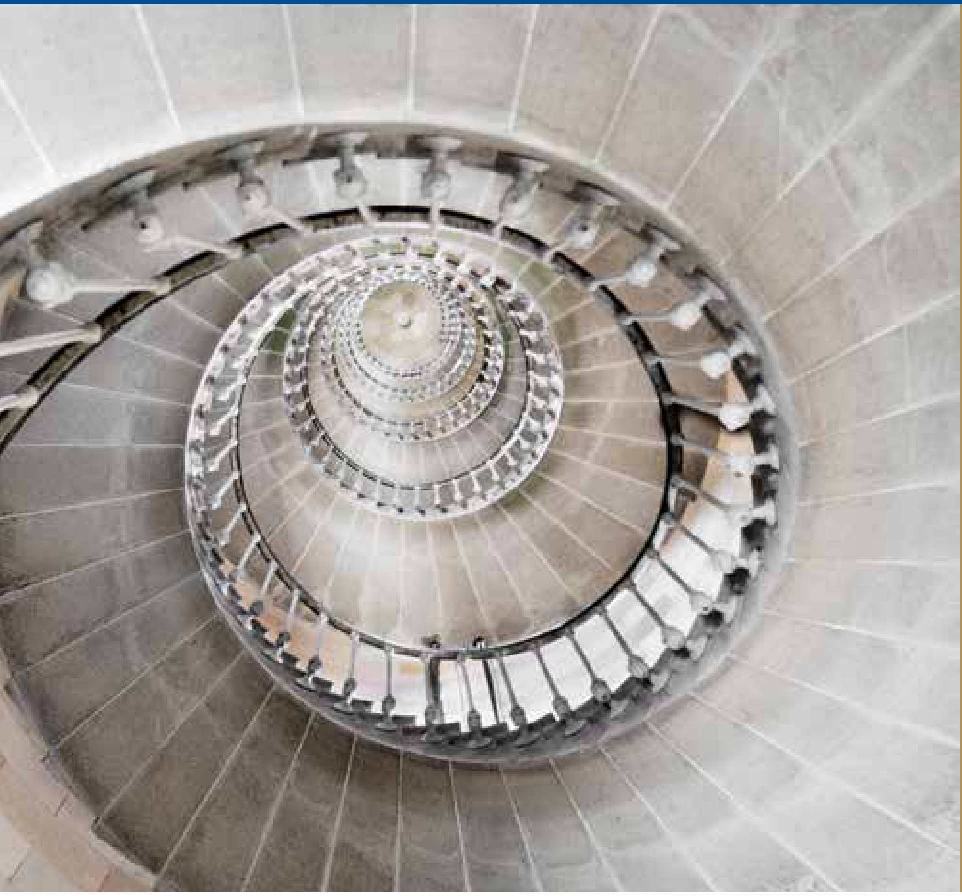
- Trust and Investment Advisory Services
- Member Communication & Consultation Support
- Financial Education Services
- Governance Training

Family Wealth and Legacy Management

While life is uncertain, your family's financial future shouldn't be. That's why T.E. Wealth determines how your finances can best fulfill your goals now, as well as in the future. Our specialized financial experts will oversee and manage your financial affairs, with a view towards building a legacy through preservation and growth of assets, for generations to come.

Our services include, but are not limited to:

- Tax Planning and Preparation
- Inheritance and Estate Services
- Risk Management
- Stock Option Exercise Programs
- Retirement Planning
- Sale of Business/Succession Planning
- Policy and Governance
- Asset Management
- Performance Monitoring
- Portfolio Construction
- Consolidated Reporting and Benchmarking of Total Family Assets
- Bill Payment and Banking Reconciliation
- Accounting, Bookkeeping and Reporting
- Dignified Aging Guidance and Services
- Financial Advisory and Coaching for Younger Generations



With an average tenure of 15 years in their respective disciplines, our experts have vast experience in all aspects of financial planning, economic cycles and market corrections, making them well equipped to help you navigate fluctuations and nuances in everchanging global markets.

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To learn more about T.E. Wealth, please contact us: www.tewealth.com · 1-888-505-8608

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