Our Partnership with You

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We provide comprehensive wealth management in the context of a long-term partnership with you. Through our experience we have learned it is important that everyone is clear on what to expect if we are to develop and maintain a successful working relationship – one where I can help you achieve your wealth and lifestyle goals.

## Keys to a Successful Relationship: What You Can Expect

You can expect that we will consistently and responsibly perform all services related to the provision, review and ongoing monitoring of the wealth management solutions we implement on your behalf.

We will always:

* Strive to acquire and maintain a thorough understanding of your financial goals
* Update your current financial information on a regular basis
* Carefully assess and monitor your investment risk and time frame
* Explain the implications of all recommended strategies and answer questions you have
* Update you as and when appropriate by email, mail and phone
* Meet with you regularly to review what matters most to you
* Act as your primary Financial Advisor, coordinating the efforts of others when required
* Treat you with utmost respect and professionalism

## Keys to a Successful Relationship: What I Can Expect

We’ve learned through experience that effective communication and mutual respect are essential to a long-term partnership. A few other criteria which help define our success include:

* Your commitment to me as your Financial Advisor
* Your trust in my abilities to provide you with recommendations and advice
* Your complete disclosure about what matters to you most

We need you to know that our recommendations are always based on helping you achieve your financial and lifestyle goals. It’s important you understand that all advice will be based on the information you provide to me. Therefore, if I am to provide advice best suited to you, I need you to fully participate in the financial planning process with me.

**Keys to a Successful Relationship: Mutual Responsibilities**

Having a solid partnership is essential to effective wealth management. We both agree to make your wealth management a priority and will keep each other informed of any new developments that might affect these strategies. We will also agree to take time to regularly review what matters most to you.

We will always work together in the spirit of mutual trust, respect, and understanding.