



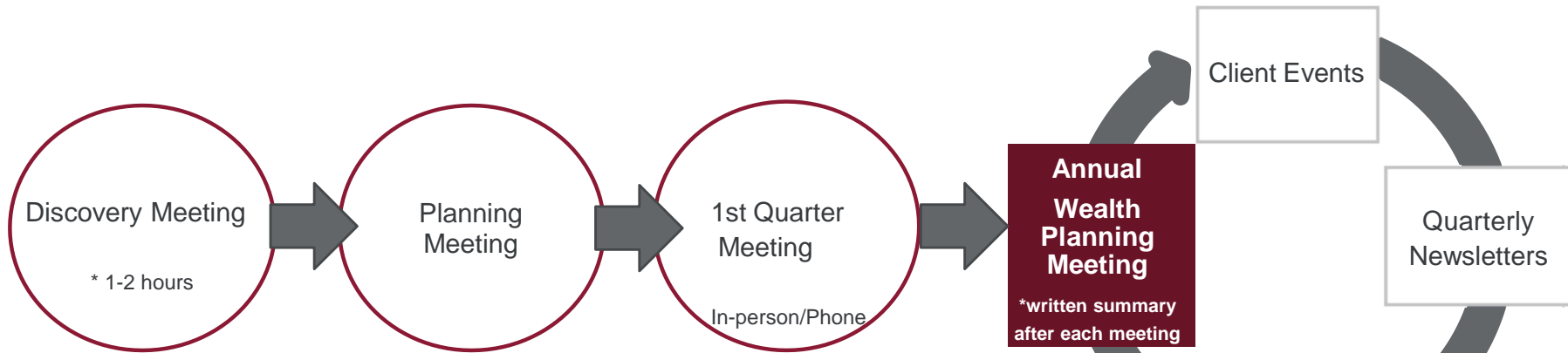
Client Experience

LEY HALL WEALTH MANAGEMENT

Solutions that fit your life- *for life*

Ley Hall Wealth Management Client Experience

Solutions that fit your life- *for life*



- Answer Your Questions
- Your Previous Experiences
- Your Goals & Investment Objectives
- Risk Tolerance
- Retirement Forecasts
- Ley Hall Wealth Philosophy
 - Why you might like us
 - Why you might not

- Wealth Plan Presentation
- Investment Recommendations Presented
- Fee Disclosure
- Account Tax Efficiency:
 - Charitable Giving Strategy
 - Capital Gains/Loss Strategy
- Review Client Services:
 - Estate Planning Review
 - Wealth Profile Concept
 - Family Meetings
 - Investment Policy Statements
 - Retirement Forecasts
- Next Steps (Administrative)
 - Gather all applicable information to open new accounts

- Review the first quarter statements & performance
- Address outstanding items, questions and/or concerns
- Establish Service Plan Schedule

Internal Partners:

- Private Banking
- CIBC Trust Services

Working with External Partners:

- Accountants
- Lawyers

