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*

Discovery Meeting

* 1-2 hours

- 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

Planning Meeting

- 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

1st Quarter Meeting

In-person/Phone

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

Annual Wealth Planning Meeting

***written summary after each meeting**

Client Events

Quarterly Newsletters

Reporting
- Tax
- Research
- Fees

Internal Partners:
- Private Banking
- CIBC Trust Services

Working with External Partners:
- Accountants
- Lawyers

CIBC