

Client Experience

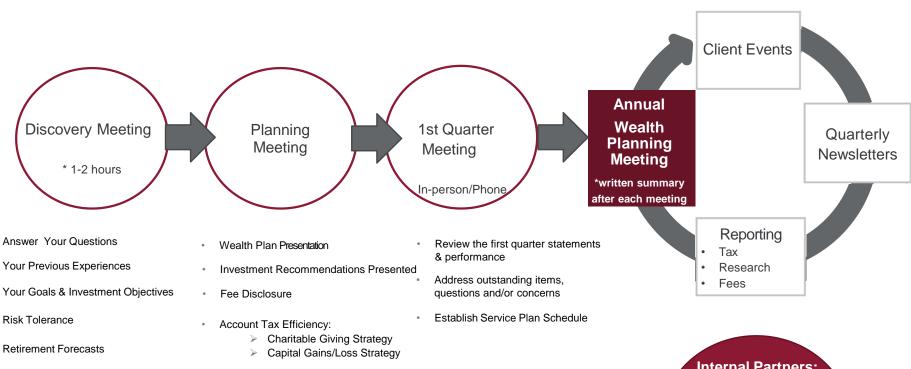
LEY HALL WEALTH MANAGEMENT Solutions that fit your life- for life

Our Guarantee:

We believe a comprehensive Financial Plan is the foundation of a successful relationship with new and current clients. For this reason, we will develop a Financial Plan for all those who are interested in, or considering, our services with no cost or obligation. Each Financial Plan will factor both tax and estate planning in our recommendations.

Ley Hall Wealth Management Client Experience

Solutions that fit your life-for life



- Ley Hall Wealth Philosophy 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

Internal Partners:

- Private Banking
- CIBC Trust Services

Working with External Partners:

- Accountants
- Lawyers



Why you might like us

Why you might not