CIBC PRIVATE WEALTH

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*

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

<u>Internal Partners:</u>
- Private Banking
- CIBC Trust Services

<u>Working with External Partners:</u>
- Accountants
- Lawyers

CIBC