WS | WEALTH STEWARDS

PS | PORTFOLIO STEWARDS

When Tax & Financial Decisions Overlap **Coordination Matters**

Consider how wealth management services, integrated with the expertise of your accountant may benefit you, your family & your business.

Meet Wealth Stewards - What Sets Us Apart?

Wealth Stewards provides holistic wealth management for higher-net-worth Canadian families & business owners. Rooted in our core values and fiduciary responsibility, clients gain access to a unique combination of attributes that few other firms can offer:

Deep Specialization | **Human-Centred Approach** | **Commitment to Stewardship**

Discretionary Portfolio Management

Portfolio Stewards Inc. is a registered Portfolio Manager in Ontario, Alberta, BC & Quebec, holding us to the highest fiduciary standard. Client portfolios are managed on a discretionary basis guided by a tailored Investment Policy Statement.

Our Investment Opportunities

Portfolio Stewards Inc. provides access to public as well as private market opportunities to meet unique objectives such as low volatility, accessing niche asset classes, minimizing taxes, etc. We do not rely on traditional mutual funds and ETFs.

Team-Based Expertise

Our in-house team of specialists in financial planning, investment management, tax, estate, insurance, and business valuation collaborate across disciplines as needed. The accreditation of our experts include: CFP, CPA, CA, CFA, CIM, LL.M, CEA & TEP.

Fee Structure

We use a transparent (fee based) pricing structure based on the percentage of assets under our management. Pricing is tiered and will include a financial plan as needed.

Professional Advisor Compensation

Advisors are salaried with performance-based bonuses. We are not commission-based. This model helps ensure our advice remains objective and client-focused.

Corporate Structure

Wealth Stewards and its subsidiaries are privately held. This solidifies our ability to do what's in your best interest, free of sales targets and external shareholders.

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What to Expect from your

Complimentary Initial Assessment and Evaluation (IA&E)?

We recognize that choosing an advisor is a difficult decision. Our IA&E is a chance for you to sit down with one of our wealth advisors, have an initial conversation and receive a second, objective opinion.

What is an IA&E?

In order to determine whether we can help you with your financial needs, Wealth Stewards provides a complimentary Initial Assessment and Evaluation (IA&E).

This unique process allows our advisors the opportunity to get to know you on a human level and to understand what is most important to you, your family and your business in order to ensure that your financial plan and investments best reflect your life and priorities.

The IA&E is of significant value and there is no obligation to move forward with our services after it is completed.

Retirement Planning

Tax Planning

Estate Planning

Insurance & Risk

Philanthropic Strategies

What Will the Report Identify?

- Will your financial resources be adequate for you to continue enjoying the lifestyle that you want?
- Are there any financial risks you are exposed to?
- Are there any opportunities that may have been missed?

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