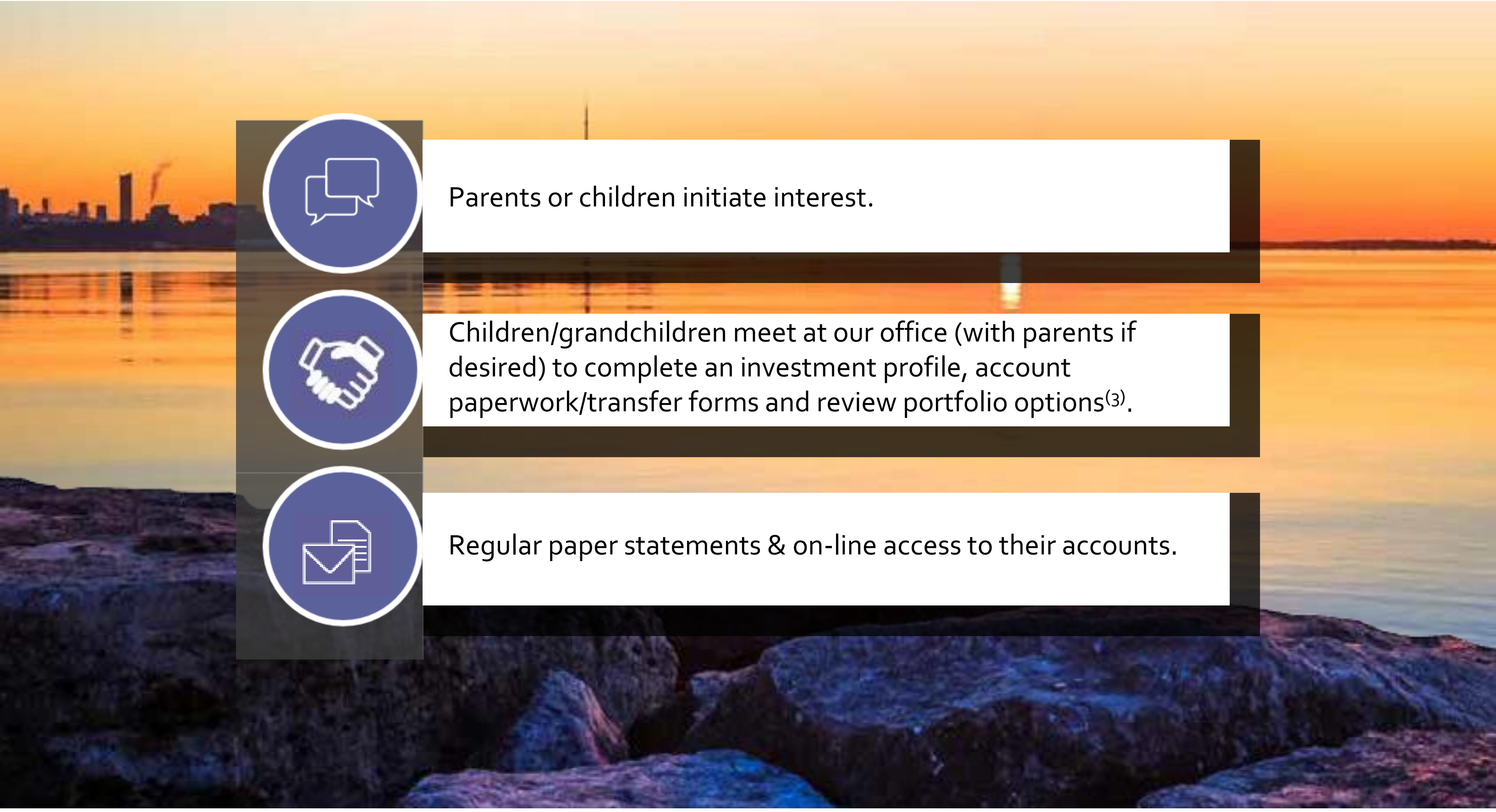
Best Client Premium Service Offering

We Waive Your Child/Grandchild's Fees

The 25/25 Process

We want to help ensure your adult children/grandchildren start with a firm financial base. As a value-added service available only to our best clients, we will manage investment accounts and waive our advisor fees[(1)] for your adult children and grandchildren under age 25, who's total individual portfolio(s) are under $25,000[(2)] (excluding RESPs).

25/25 Process Steps



- Parents or children initiate interest.
- Children/grandchildren meet at our office (with parents if desired) to complete an investment profile, account paperwork/transfer forms and review portfolio options[(3)].
- Regular paper statements & on-line access to their accounts.

(1) Money management costs, other advisor account expenses excluded
(2) All accounts owned by the adult child/grandchild must be held at West End Wealth Planning to be eligible.
(3) Choose from our ETF managed portfolios' solutions

West End wealth planning
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