Best Client Premium Service Offering

Personal Wealth Planning for Your Adult Children & Grandchildren

Teaching young adults the right financial habits early is key to their long-term financial success. As a value-added service, available only to our best clients, we will provide personal wealth planning services for your adult children and/or grandchildren wishing to start on their own wealth accumulation planning.

There is no minimum portfolio size for this service, which includes regular reviews and updates. Our 25/25 value added service is also applicable.

The Process

- 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.
- Regular paper statements & on-line access to their accounts.
- Regular wealth planning reviews and updates.
- Access to our resources as their accounts grow, their lives change, and they encounter Critical Financial Events (anything and everything that can affect their finances).

West End wealth planning

Investment Planning Counsel® IPC SECURITIES CORPORATION

CIPF Canadian Investor Protection Fund MEMBER

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