

Sophisticated. Disciplined. Superior.



A Portfolio Manager offers a higher standard of wealth management.

You have worked hard and responsibly to build a successful investment portfolio. One that offers you peace of mind and financial stability. Now it is time to ensure your wealth continues to grow and meet your objectives so you can enjoy the lifestyle you have earned.

Doing so depends on discretionary wealth management that only a disciplined professional like a Portfolio Manager can provide. A Portfolio Manager is a trusted and elite professional with advanced credentials and an exemplary track record who offers experience and elevated client service ideally suited to investors like you.

Key benefits of working with a Portfolio Manager.

Comprehensive reporting

In addition to the monthly or quarterly reports required by industry regulations, Portfolio Managers provide supplementary reports that offer consolidated views of all your accounts.

Peace of mind

Rooted in an Investment Policy Statement that takes into account your specific needs, a Portfolio Manager follows regulatory standards and a strict investment discipline that offer added security.

Block trading

A Portfolio Manager can execute timely trades for all clients, all at once. This ensures everyone benefits equally from market opportunities.

Accountability

A Portfolio Manager's fiduciary responsibility means he or she acts with a higher standard of care, honesty and good faith – and always first and foremost in your best interest.

Tax planning

Certain investment choices and strategies offered by a Portfolio Manager provide you with potential tax advantages that can optimize your accumulation of wealth now and in retirement.

Value pricing

Portfolio Manager fees are transparent, based on a percentage of your investments rather than on commissions from high transaction volumes, and may be tax-deductible in the case of non-registered accounts.

Active management

Delegating day-to-day decisions to a Portfolio Manager allows for quick response to unexpected market moves, better protection of your assets in difficult markets and the ability to take advantage of unforeseen investment opportunities.

Flexible options

A Portfolio Manager has access to a broad range of investment choices, including bonds, stocks, mutual funds, ETFs and alternative investments, offering you the best strategies and instruments to grow your wealth.

Superior portfolio management

The Portfolio Manager designation, held by less than 5% of all investment advisors in Canada¹, offers an enhanced measure of wealth management and requires the highest level of education and experience in the investment industry.

A powerful partnership to help reach your goals.

To find out how you can benefit from working with an experienced Portfolio Manager, contact me directly.



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¹ What is a Fiduciary Financial Advisor, Danny MacKay, SeekAdvisor, 2019. iA Private Wealth® is a member of the Canadian Investor Protection Fund and the Investment Industry Regulatory Organization of Canada.