



Have you had any concerns about your investments lately?

Need a second opinion?

Get a complimentary investment review to help you:

- Know the potential risks in your current investment portfolio.
- Know if you are maximizing your earning potential
- Know if you are minimizing tax consequences
- Know if you will have sufficient income for retirement.
- Ensure that your portfolio is aligned to your overall risk tolerance

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Investment Advisor

Dundee Securities Corporation

Please feel free to contact me directly to discuss your current portfolio.

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A second opinion can give you peace of mind knowing that you are on the road to financial freedom.

A second opinion begins with an assessment of your current holdings and should answer the following questions.

Risk Management

What is your mix of cash, fixed income and equities?

Performance Review

How does your portfolio compare to the appropriate benchmark and peer group?

Management Fees

How much are you being charged?

Investment Overlap

Do you own the same stock in different funds?

Holdings Correlation

Are you truly diversified or di-worsified?

As an Investment Advisor with Dundee Securities Corporation, I provide investors with sound financial strategies tailored to individual needs and objectives.

Standard services include effective tax strategies, wealth management and expertise in alternative investments such as ETFs and Closed End Funds.