WELCOME TO CANADA
CONSULTATION PROGRAM

PEGASI™
WEALTH ADVISORY


CREATE
YOUR
OWN
JOURNEY

Dear Future Client,

Welcome to Canada! Moving to another country is a big decision and never easy. Fortunately, we are here to help. At Pegasi Wealth Advisory, we specialize in offering consulting services for individuals and families coming to our beautiful country.

I would like to personally invite you to become a private client ours. Our Welcome To Canada consultation program is designed to help new immigrants and returning citizens prepare financially, so that you can settle in seamlessly.

This booklet is your guide to many valuable services we offer to you upon becoming our private client. We look forward to partnering with you on your journey.

Sincerely,

Terry Tang

Terry Tang, MBA, CIM
Director

Welcome To Canada

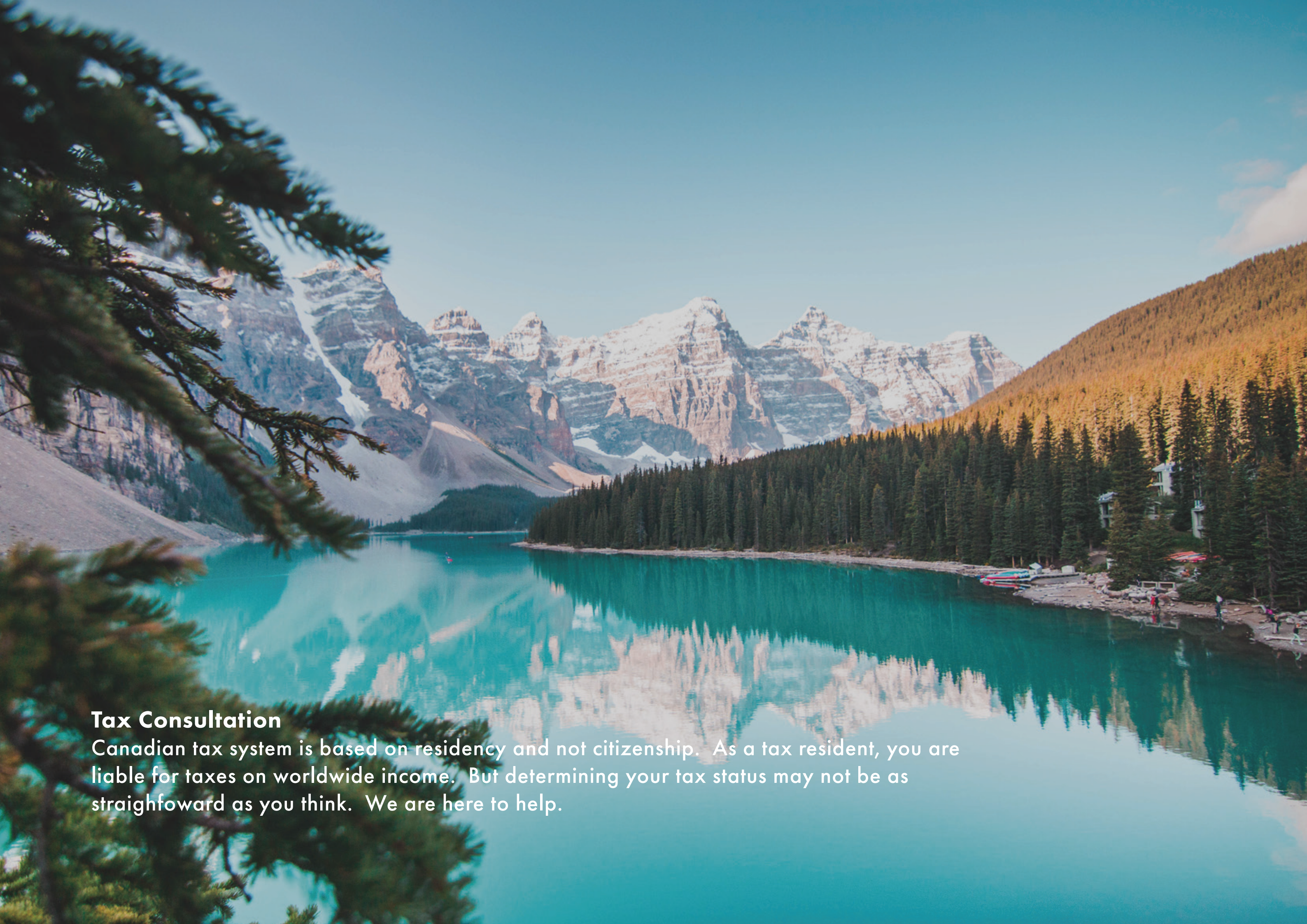
Congratulations! You have taken the first step in leading a new life in Canada. The next step is to properly arrange your financial matters so that you and your family can settle in comfortably.

Our Program

Our Welcome To Canada consultation program is designed to help new immigrants and returning citizens bring assets into Canada and build financial footprint, all of which in the context of meeting tax filing requirements and tax minimization.

Initial Consultation

To help you get started, we offer a 30 minutes initial consultation. The purpose of the initial consultation is for you to get an understanding of the program and how to prepare for moving to Canada.



Tax Consultation
Canadian tax system is based on residency and not citizenship. As a tax resident, you are liable for taxes on worldwide income. But determining your tax status may not be as straighfoward as you think. We are here to help.

Transfer of Assets

Bringing in assets into Canada can be complicated. Different types of assets may have different tax consequences. Our program ensures your assets can be transferred into Canada without hassle.

Building A Financial Footprint

Once your assets are brought into Canada, you need to build a financial footprint. Whether it's opening a bank account and an investment account, buying a residential property, applying for a mortgage, filing tax return, we got you covered.

Scope of Consultation

Tax Consultation

Define your residential status and tax obligations under Canada's tax system. The timing of the residential status may have a significant impact on your tax liability and filing requirements.

Transferring Assets To Canada

Arrange for the transfer of assets into Canada and tax minimization. Assets may include foreign currencies, stocks, bonds, structured products, mutual funds, and pensions.

Retaining Assets in Home Country

Arrange for foreign assets to meet filing requirements and prepare for potential tax implications. Foreign properties may include rental property, pension, investment accounts, and life insurance policy.

Apply For Government Credits, & Grants

Determine the availability, and apply for, government benefits, credits, and grants upon arrival.

Opening A Bank Account

Set up a Canadian bank account at a major Canadian bank upon arrival, select a branch location according to the client's preference.

Opening of Investment Accounts

Set up a Canadian integrated investment account at Pegasi Private Wealth of ACPI upon arrival. The integrated account may include TFSA, RRSP, RRIF, LIRA, RESP, and Non-Registered.

Acquiring A Primary Residence

Acquire a residential property in Canada based on price, location, amenities, transportation, school, neighbourhood watch, parks and nature. Realtor and lawyer will be arranged with the guidance of the consultant.

Applying For A Mortgage

Apply for a mortgage with a mortgage specialist at a major Canadian bank before or upon arrival. You will be guided by our consultant throughout the process, including selecting mortgage types and negotiating rates.

Filing Your First Tax Return

File your tax return with a qualified accountant for the first time in Canada. The consultant will work closely with the accountant and ensure your tax return is filed properly.

Bio

Terry brings you more than 20 years of experience in the financial services industry. Prior to Pegasi, he had a successful career working for a number of top financial institutions in the field of sales management and business development. He has held various management positions in Toronto, Hong Kong, and Kuala Lumpur.

Terry specializes in international investing and offers gold standard for client experience and service performance. Over the years, Terry has helped many of his clients achieve their financial goals.

Terry is a Chartered Investment Manager (CIM) and holds an MBA degree from University of Iowa - Tippie School of Business.

Consultation Fee

The consultation fee is determined on a case-by-case basis and based on the complexity of the case. The complexity is based on the tiers below, which serves as a guideline for how the fee is charged.

TIER 1

- Tax residency in Canada
- Cash including foreign currencies
- Investment accounts in home country
- Life insurance policies in home country
- Pensions in home country
- Residential property in home country
- Rental property in home country

TIER 2

- All items in Tier 1
- Other assets in home country

TIER 3

- Alli items in Tier 2
- All other assets outside of home country

Contact Information

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Let's talk. Contact us today.