TvH
FINANCIAL

OUR PARTNERSHIP WITH YOU

We provide comprehensive wealth building strategies in the context of a long-term partnership with you. Through our experience we have learned it is important that everyone is clear on what to expect if we are to develop and maintain a successful working relationship – one where I can help you achieve your financial and lifestyle goals.

KEYS TO A SUCCESSFUL RELATIONSHIP: WHAT YOU CAN EXPECT

You can expect that I will consistently and responsibly perform all services related to the provision, review and ongoing monitoring of the wealth building solutions we implement on your behalf.

I WILL ALWAYS:

- Strive to acquire and maintain a thorough understanding of your financial goals.
- Update your current financial information on a regular basis.
- Carefully assess and monitor your investment risk and time-frame.
- Explain the implications of all recommended wealth building strategies and gladly answer any questions you may have.
- Update you as and when appropriate by email, mail and phone.
- Meet with you regularly to review your Personal Financial Organizer (PFO).
- Act as your primary Financial Advisor, coordinating the efforts of other related professionals as and when required.
- Treat you with utmost respect and professionalism.

KEYS TO A SUCCESSFUL RELATIONSHIP: WHAT I CAN EXPECT

I've learned through experience that effective communication and mutual respect are essential to a long-term partnership. A few other criteria which help define our success include:

- Your commitment to me as your Financial Advisor
- Your trust in my abilities to provide you with recommendations and advice

- Your complete disclosure about what matters to you most

I need you to know that my recommendations are always based on helping you achieve your financial and lifestyle goals. It is important you understand that all investment, tax, estate and insurance advice will be based on the information you provide to me. Therefore, in order for me to offer recommendations and advice best suited to you, I need you to fully participate in the wealth building process with me.

KEYS TO A SUCCESSFUL RELATIONSHIP: MUTUAL RESPONSIBILITIES

Having a solid partnership is essential to effective retirement planning. To this end, we both need to make your financial strategies a priority. We will agree to keep each other informed of any new developments that might affect these strategies. And we will agree to take the time to regularly review your Personal Financial Policy Statement.

We will always work together in the spirit of mutual trust, respect, and understanding.

President TvH Financial Inc.