

THE VALUE OF ADVICE

As with most professional services, investment management has costs.

Financial advisors provide clients with many complex and valuable services.



STRATEGIC PLANNING

Reviews your financial needs and guides you to build and maintain a financial plan.



ONGOING SERVICE

Provides time to meet and correspond. Keeps detailed records and account statements.



INVESTMENT SELECTION

Recommends solutions based on your investment profile, risk tolerance and financial goals.



PROFESSIONAL NETWORK ACCESS

Provides access to other professionals (tax specialists, lawyers, mortgage specialists) to assist you with personal and business needs.



ONGOING ADVICE

Helps you stay informed, disciplined and on track to meet changing goals, life events, tax laws and changing markets.



MONITORING & REVIEW

Continually monitors and adjusts portfolio as your needs and goals change.

MaxWealth 
FINANCIAL MANAGEMENT

RAYMOND JAMES®

Raymond James Ltd., Member – Canadian Investor Protection Fund.