PRIVATE WEALTH MANAGEMENT

CIBC WOOD GUNDY
THE WRIGHT FINANCIAL GROUP

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Service Level Agreement

Roles and Responsibilities of the Investment Advisor and Team

As your investment team we are focused on your financial goals so that you can spend more time doing the things that matter the most to you. We collaborate with a team of experts to ensure we are meeting all of your current wealth needs, while also helping you to plan for the future. While managing your portfolio, we strive to

- Demonstrate professionalism, trust, confidentiality and integrity
- Send monthly market commentary emails
- Provide personalized, total financial solutions
- Provide monthly/quarterly reviews over the phone
- Send monthly general interest newsletters
- Return calls within two hours.
- Meet with you annually to review your asset allocation and assess the need for rebalancing your portfolio
- Ensure your accounts are properly coded for CRA and IIROC.
- Regularly monitor your financial plan, against your goals