THE VALUE OF ADVICE

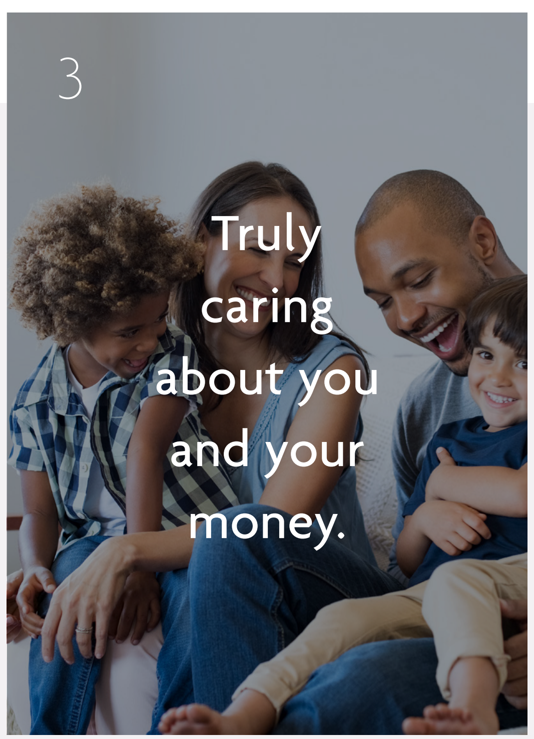
50 Ways Shawn Purcell and His Team Make a Difference

CI ASSANTE
WEALTH MANAGEMENT

WE BUILD STRONG RELATIONSHIPS AND PARTNERSHIPS WITH OUR CLIENTS BY:

1 Being honest with you, appreciating and valuing you.

2 Being someone whom you can trust and get advice from for all your financial matters.



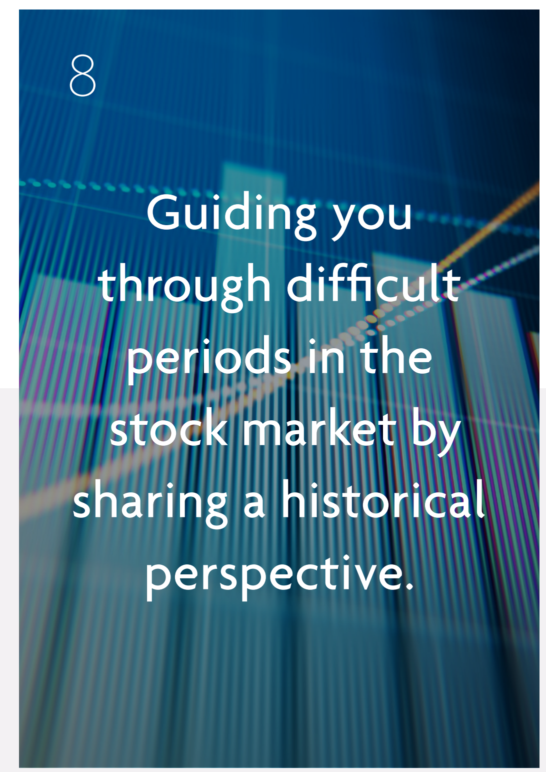
3 Truly caring about you and your money.

4 Understanding what money means to you and what motivates you.

5 Listening and asking questions to help you identify and articulate your needs, goals and objectives.

6 Working with you to alleviate worries that keep you awake at night.

7 Monitoring changes in your life and family situation.



8 Guiding you through difficult periods in the stock market by sharing a historical perspective.

9 Coaching you to do the things that will help accomplish your goals.

10 Providing guidance on what course you should take and giving you an objective perspective.

11 Acting as a sounding/discussion board for ideas you are considering.

12 Keeping you on track.

13 Anticipating future changes and proactively working through them with you.

WE PROVIDE CUSTOMIZED WEALTH PLANNING SERVICES BY:

14

Helping you make important financial-related decisions.

15

Organizing and prioritizing your financial life together.

16

Helping you determine where you are at present.

17

Formalizing realistic goals with you and putting them in writing.

18

Making specific recommendations to help you meet your goals.

19

Establishing a clear strategy and action plan.

20

Suggesting creative alternatives that you may not have considered.

21

Preparing an investment policy statement for you.

22

Reviewing and recommending life insurance policies to protect your family.

23

Staying up to date on tax law changes.

24

Helping you reduce your taxes by reviewing your tax returns for possible savings.

25

Working with your tax and legal advisors and other professionals to facilitate and coordinate your overall financial plans.

26

Identifying your saving shortfalls.

27

Helping establish your will and estate, retirement and business succession plans.

28

Helping you transfer wealth efficiently to the next generation.

29

Developing and monitoring a strategy for debt reduction.

WE CONSTRUCT PERSONALIZED CLIENT PORTFOLIOS BY:

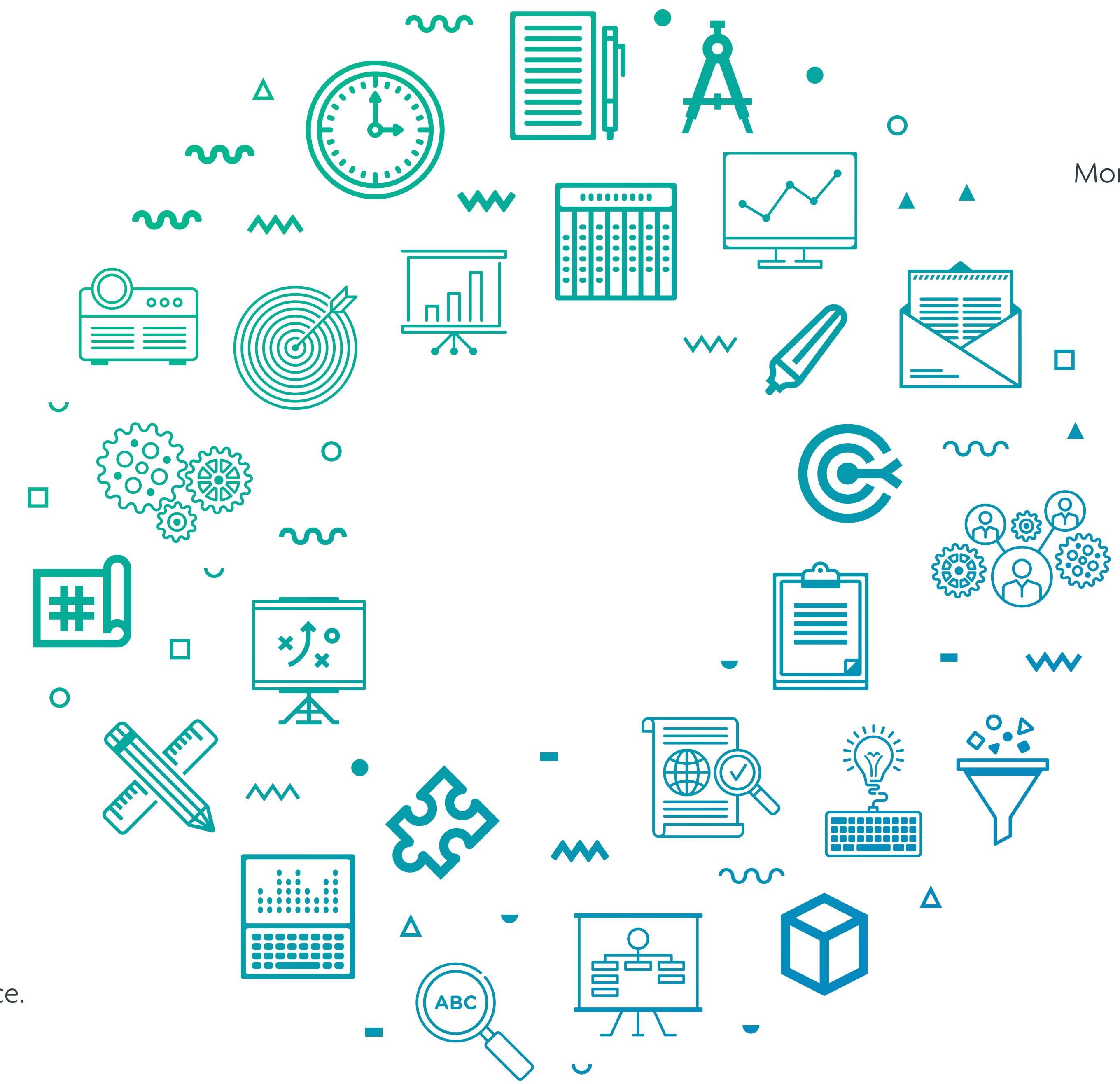
30 Preparing an asset allocation strategy for you to diversify your investments and achieve the best rate of return for your level of risk tolerance.

31 Performing due diligence on money managers and mutual fund managers to ensure appropriate investment recommendations.

32 Staying up to date on changes in the investment world.

33 Reviewing and revising your portfolio as conditions change.

34 Helping consolidate, simplify and improve your investment performance.



Monitoring and managing your investments and converting them into income as needed. 35

Helping you establish better planning and record keeping. 36

Exploring and reviewing potential income-splitting and tax-minimization strategies with you. 37

Recommending and completing appropriate tax-loss selling solutions. 38

Repositioning investments to take full advantage of tax rules. 39

WE ENSURE WE OFFER EXCEPTIONAL SERVICE BY:

40

Providing full disclosure and transparency on their fees and processes.

41

Being only a telephone call away to answer financial questions for you.

42

Proactively keeping in touch with you by providing customized and personalized information.

43

Providing referrals to and liaising with other professionals such as accountants, actuaries, tax lawyers, as needed.

44

Serving as a human glossary of financial terms such as beta,P/E ratio, and Sharpe ratio.

45

Listening and providing feedback in a way that a magazine or newsletter writer cannot.

46

Educating you on retirement, savings and other financial topics.

47

Helping educate your children and grandchildren about investments and financial concepts.

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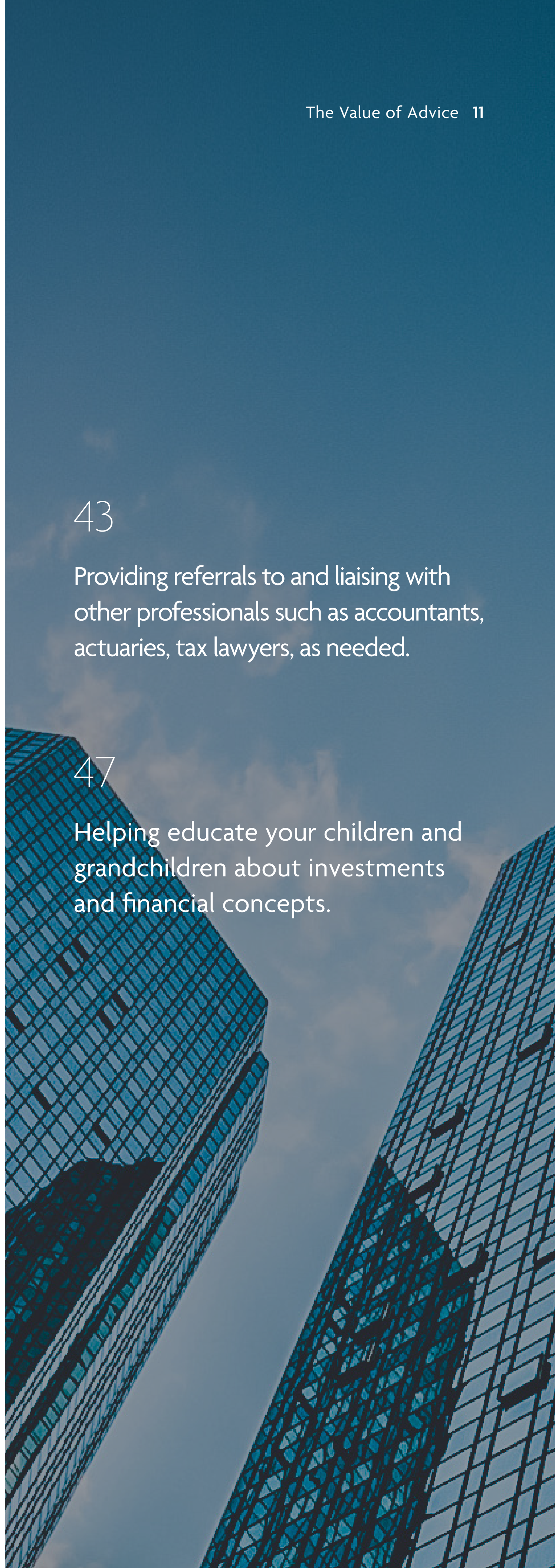
Holding seminars to educate you on significant and/or new financial concepts.

49

Helping with other non-financial advice.

50

Providing easy-to-read account statements and reports.



Who we are

SHAWN PURCELL
SENIOR WEALTH ADVISOR, BRANCH MANAGER
ASSANTE CAPITAL MANAGEMENT LTD.

Shawn Purcell began his financial advisory practice in 1994. At the forefront is his Team's Commitment of Value, driven by the unwavering dedication to service excellence he brings to each and every client relationship. Shawn believes his clients are his partners and together he helps them make the right financial decisions for themselves and their families. Acting as each client's key wealth advisor, Shawn's integrated wealth planning approach helps his clients plan and realize their goals towards a more secure, fulfilling and balanced life. Shawn, his wife Mojgan and son Sam live in North Vancouver. Away from the office, Shawn enjoys golf, skiing and playing hockey.

PEGGY MACRAE, CFP®
FINANCIAL PLANNER
ASSANTE CAPITAL MANAGEMENT LTD.

Peggy joined Shawn's practice in 2009 and shares his goal of delivering service excellence to their clients. She works closely with Shawn in all aspects of the client experience. Peggy is primarily responsible for creating financial plans and retirement projections, presentation, implementation and follow up. Peggy obtained her Certified Financial Planner designation in 2012 and has been working in the industry since 2005. Peggy, her husband Steve and children Aiden and Claire, live in Delta.

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