FAMILY TREE WEALTH MANAGEMENT PRESENTS

Exceptional Services without Exception

Live *your* dream.

1. WORKSHOPS

The content and dates of workshops will be sent to you for RSVP. In October, we will be welcoming the Honorable Sharon Carstairs as a presenter to discuss how the new legislation regarding Assisted Dying affects us all. Other workshops being planned include golf, wine tasting, travel and others.

2. COLLABORATORS

Meetings on a quarterly basis to discuss important events that may be affecting your retirement, tax and wealth plans, which will be reported to you by Bob shortly thereafter.

3. CONFERENCE CALLS

Bob will be conducting quarterly live conference calls on a number of subjects that are timely and important to you.

4. PORTFOLIO REVIEWS

Will again be "cast in stone". The portfolio rotation cycle will be over 18 months and conducted during the months on the calendar. It is important to understand that Bob is available anytime to meet, so please contact Diane at diane.roby@ipcsecurities.com or 343-291-1016 if you have immediate needs or concerns. We will provide the platform required to conduct reviews by GO TO MEETING / CONFERENCE CALL for those who are unable to meet in person.

5. CLIENT MEETINGS

Differ from portfolio reviews, in as much they are based on your need to meet regarding life transitions, family events, wealth planning and anything you deem important to meet about. Contact Diane at **diane.roby@ipcsecurities.com**.

6. FAMILY EVENTS

One family event per year will be held and will be sent for your RSVP.

7. THE ROBY REPORT

The Roby Report has been revived! This report will be mailed to you quarterly.

8. E-NEWSLETTERS

E-newsletters will continue to be sent to your in-box monthly.

9. PODCASTS

Specialists will discuss the stock markets, the economy and other important matters and will be downloaded quarterly to our website at **www.rroby.ca**

10. FAMILY COUNCIL GET-TOGETHERS

Many families experience issues pertaining to estate planning, wealth, insurance and personal family matters. Sometimes a third party can help solve these issues before they become out of hand. The Roby Team will take care of all of the planning including sending out agendas, invites and Skype all within the comfort of our executive board room at no cost.

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FAMILY TREE WEALTH MANAGEMENT
For A Future You Can Count On

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