Service and Value Offering

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At XYZ Wealth, we're committed to providing you with an unrivaled wealth management experience. Our team is dedicated to building relationships that expand beyond your investments and providing you with personalized solutions. We offer a wide range of services coupled with a first-class client experience.

As part of the fees we charge, you are entitled to the following services and value-adds:

Financial Management	Portfolio Management	Tax Planning	Risk Management
Mortgage & debt analysis	Portfolio/pension analysis	Tax analysis	Life Insurance
Cash flow analysis	Diversified product offering	Tax return coordination	Critical illness & disability
Cash flow projection	Retirement/education/savings	In-depth personal tax planning	Long-term care insurance
RRSP/leverage loans	Repositioning/rebalancing	Business tax planning	Asset allocation to reduce risk
Establish financial goals	Maximized risk-adjusted returns	Tax-minimization strategies	Review of money managers
Retirement Planning	**Legacy Planning**	**Life Planning**	**Client Experience**
Retirement income analysis	Estate planning analysis	Eldercare issues	Deep client discovery
Assessment of objectives	Wills and POA	Workplace transitions	Client action plans
Retirement expenses analysis	Charitable giving	Healthy living	Regular status reports
Retirement cash flow projection	Business succession planning	Referral to other professionals	Consistent communication
Retirement education sessions	Access to legal network	Other non-financial advice	Proactive problem resolution

We'd like to ensure you're taking advantage of the full range of our services. Our team values the relationship we have with you and your family and we look forward to continuously exceeding your expectations.

Client Signature:______________________________ Date:____________________

Client Signature:______________________________ Date:____________________

Advisor Signature:______________________________ Date:____________________

Purpose: To ensure your clients understand the full extent of your services and the value of your advice. Use this tool with clients that may not be utilizing all of your services and may be good candidates for your full wealth planning solutions.

Use with: Prospective or current clients

Instructions:

1. Start by customizing this tool to represent your practice, values and beliefs. The look and content should be personalized to reflect your brand and core messaging. Use the 8 categories provided or create your own to help articulate your unique value to clients.
2. Prior to your next client meeting, review your client management system and highlight all of the services and value-adds your client is currently receiving.
3. During your annual review meeting, once you have conducted your client re-discovery, present the *Service and Value Offering* to your client. Position your value using each of the categories provided.
4. Discuss the benefits and solutions that may be relevant to the client. During this time, you may also wish to obtain feedback from your clients on what's important to them.
5. Along with your clients, sign and date the tool to help track progress or use for future reference.
6. Create client action plans if required.
7. Update your client management system to capture any new information obtained during the meeting.

CI Investments™

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