



*This brochure is one of a series intended to help you invest successfully and achieve your financial goals. If you have any questions or comments, speak to your financial advisor directly or contact investor services.*

# WORKING WITH YOUR FINANCIAL ADVISOR

As a GP Wealth client, you're fortunate to have an established relationship with an experienced, dedicated financial professional — your GP Wealth financial advisor. No matter where you are in your financial journey, your financial advisor can assist you with expert advice and guidance that will help you stay on track towards your goals.

## The value of financial advice is well-recognized

Independent research confirms that investors who use financial advisors on an ongoing basis achieve higher levels of wealth. In fact, a report commissioned by the Investment Funds Institute of Canada (IFIC) shows that investors working with financial advisors accumulate on average about three times the net worth and four times the investable assets as do-it-yourself investors.



To learn more, visit our website and download IFIC's report, which includes key findings by global market research firm Ipsos Reid:

**[gpwealth.ca/valueofadvice](http://gpwealth.ca/valueofadvice)**

## Making the most of the relationship

Think of your relationship with your financial advisor as a partnership. Your financial advisor has a number of specific responsibilities to you, including understanding your financial situation, knowing your risk profile and only recommending suitable investments.



GP WEALTH MANAGEMENT

INDEPENDENT THINKING WORKING FOR YOU



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Once you've created and implemented your financial plan, your financial advisor offers the market insights, continuous monitoring and discipline that you'll require to realize your financial objectives. Periodically, your financial advisor will also revisit your financial plan to determine if it's still on track and make any necessary adjustments.

You can expect your financial advisor to:

- + Make clear and specific recommendations
- + Explain how each transaction fits into your portfolio
- + Outline the risks involved
- + Help you stay on course to execute your financial plan

With the knowledge and confidence you gain through your relationship with your financial advisor, you'll be better equipped to develop and maintain an investment strategy that's right for you and your family.

### **Your role as a client**

The focus of *your* financial planning process is *you*. That's why it's important for you to work productively with your financial advisor.

Here are some things you can do to help ensure a positive outcome:

- + Be prepared for meetings
- + Ask questions and seek clarifying information
- + Stay on top of your investments by reviewing statements and other relevant documents
- + Try to stay informed about events affecting your investments
- + Be forthcoming about your personal values, including goals, concerns, preferences and worries
- + Keep your financial advisor up to date on changes to your personal or financial circumstances

What your financial advisor can do for you:

- » **Comprehensive financial planning**
- » **Investment planning**
- » **Retirement planning**
- » **Education planning**
- » **Estate planning**
- » **Advanced tax planning**



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