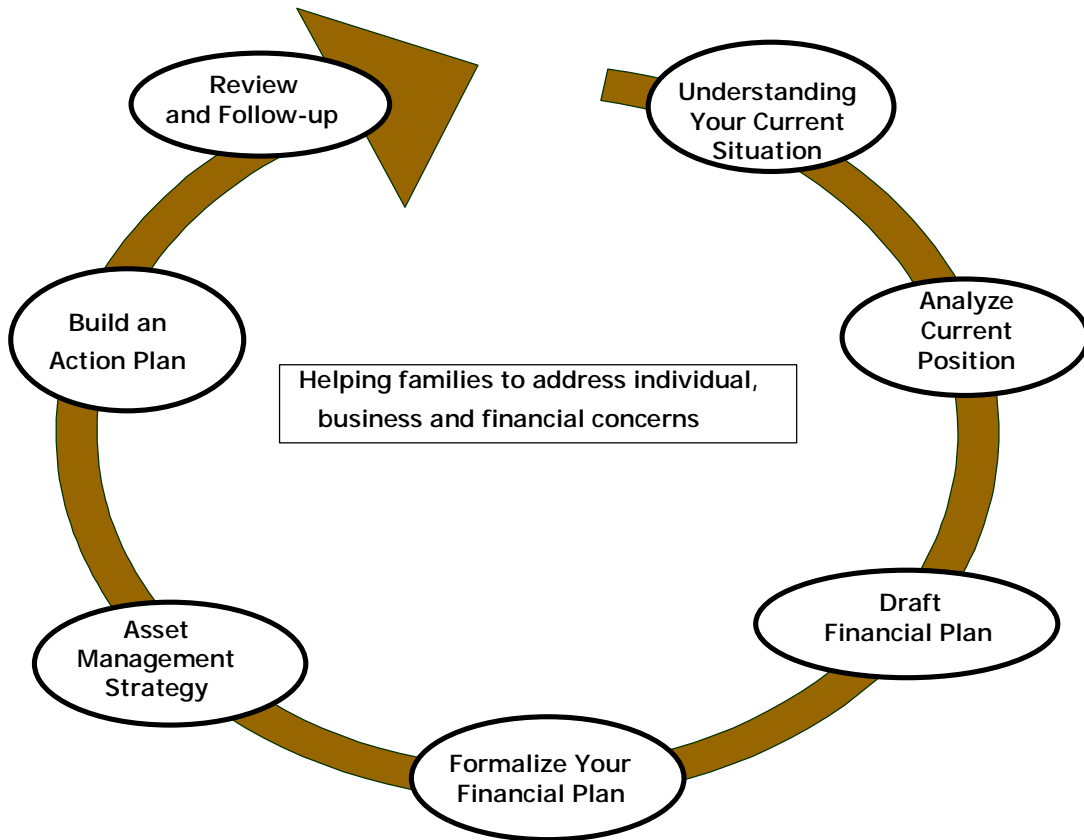


The Personal Success Formula



Our Value Proposition

We help our clients provide for their lifestyle, retirement and estate planning needs.

Our aim is to create strong client relationships that last a lifetime. To accomplish this, we use all of our professional, business and personal experience to meet their current and future needs.



1500 Ouellette Ave, Suite 401 • Windsor, Ontario • N8X 1K7
Tel: 519-258-7676 • Fax: 519-258-1617 • 1-800-501-0806
Email: info@soulliere.com
www.soulliere.com

The Personal Success Formula

Helping families to address individual, business and financial concerns.

Understanding Your Current Situation:

What is important to you? Is it ensuring an appropriate retirement lifestyle, minimizing taxes or maximizing the value of your estate? Our team will take the time to listen. We want to understand what concerns you and determine what success means to you! Only by fully learning what is important to you can we make appropriate financial recommendations.

Analyze Your Current Position:

Once we have discussed what is important to you, the next step is to determine what your financial picture looks like today. From here, we can begin looking at solutions, that may help you alleviate your concerns and exceed your objectives.

Draft Financial Plan:

Our next step in The Personal Success Formula™ process is to develop a draft financial plan for your review. Together, we will talk about what adjustments are needed to accurately describe your situation.

Formalize Your Financial Plan:

Your customized financial plan will incorporate what is important to you, any concerns that you have and your current financial position. The recommended financial plan will provide the map to reaching your financial goals. We take the time to explain and educate you about all the solutions that we recommend.

Asset Management Strategy:

We will determine your investment personality and recommend a portfolio of investments that is right for you. We strongly believe in diversification by asset type, geography, market capitalization, sector and management style, and we clearly explain the importance of each of the factors.

Build an Action Plan:

To put your financial plan in place, together, we will set an activities time table. We take the time to clarify each of the precise steps needed to implement you financial plan.

Review and Follow Up:

The Personal Success Formula™ is not a one time process. Life presents changes that can impact your original plan. We want to make sure any changes are taken into consideration so you can continue to reach your goals. It is important to review your plan regularly (we suggest annually). In the review, we are happy to address your concerns and answer any of your questions.



1500 Ouellette Ave, Suite 401 • Windsor, Ontario • N8X 1K7
Tel: 519-258-7676 • Fax: 519-258-1617 • 1-800-501-0806
Email: info@soulliere.com
www.soulliere.com

