JYC's typical Wealth Management (WM) Strategies Roadmap with clients

Discover

Face-To-Face Client Discovery Meeting

Create

Open account

Determine Investment Policy Statement

Present investment proposal

Determine Advice & Service Scorecard

Determine Wealth Planning Roadmap

Build

Invest accordingly

Meet with suitable TD specialists, if needed

Present and implement WM strategies

Review

Regular phone call review

Face-To- Face Annual Client Meeting

Manage

Manage and rebalance investment portfolio due to major events or fundamental changes

Manage WM Roadmap and continuous review of client's Advice & Service Scorecard