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- Appointments
- Administrative support
- Contact information changes

Contact Vivian, Adrienne,
Laura or Yubin

- Trade execution
- Research opinion or request
- Investment and wealth planning/
taxation queries
- Stock and mutual fund inquiries
- Questions on new/existing insurance strategies
- RSP/RIF withdrawals

Contact
Vincent,
Thor or
Kenneth

- New account requirements
- Change updates to monthly
transfers or contributions
- Tax forms required for
accountant/tax returns
- Documentation updates
- Funds transfers

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