The Smith Value Add

Optimize
Wealth Management

THE NEXT GENERATION IN WEALTH MANAGEMENT

Optimize Wealth Management

About John Smith

John Smith is an experienced Certified Financial Planner with an established history of helping clients meet their long-term financial goals and dreams. Being a longstanding member of the Canadian Institute of Financial Planners, FP Canada and Advocis, John is an ethically strong financial professional following “Standards of Professional Responsibility” from FP Canada and “The Advocis Code of Professional Conduct” from Advocis.

Skilled in Comprehensive Financial Planning with a focus on Business owners, Group Benefits, and working with Retired individuals who want the most out of life, John has exceptional strategic planning skills, and a demonstrated ability to conceptualize and carry out major projects and initiatives. John is a seasoned professional whose honesty and integrity provide for effective leadership and optimal business relationships.

Dedicated to his family and community, John is involved in various charities, school advisory councils, developing seniors housing, working with local development boards, and giving his time to local nonprofit organizations. He is a firm believer in giving back to the community and setting an example for those around him.

“My goal is to use honesty and integrity to help you reach your desired goals.”

John Smith

THE NEXT GENERATION IN WEALTH MANAGEMENT

Optimize
Wealth Management

John's Approach to Financial Planning

John puts his clients' interest above everything else to ensure that he earns their business not only at the beginning of the relationship but throughout every stage of it as well.

What John Does

John provides clients with a comprehensive approach to financial planning, tax preparation and will preparation, ensuring his clients always benefit from the highest level of service. At Optimize, John works alongside an experienced team of licensed portfolio managers to help clients achieve their desired long-term financial and investment goals.

The cornerstone of his service rests in effectively matching his clients' financial and life goals with a personalized financial planning strategy and overall customer service experience which will exceed their goals in every respect. John measures his success by how well he has helped his clients achieve their specific goals and objectives.

What John Stands For

John believes that much of his successes and accomplishments to date are as a result of his beliefs and values which he stands by: honesty, persistence, teamwork, excellence, and creativity.

Optimize
Wealth Management

Optimize Wealth Management's Investment Services

Optimizing your investments is an important step to achieving your financial goals but realize that it is just one step in a much longer journey. John, along with a licensed portfolio manager from Optimize Wealth, will focus on looking at the complete picture as it relates to your particular situation. They begin this process by listening intently to your specific goals and objectives. They then analyze every aspect of your situation such as your investments, mortgage and other debt, will, insurance, company plan, and tax preparation needs.

Once they have completed their analysis, they then design you a coordinated strategy to achieve all of your particular goals and objectives. The range of services offered through John and a licensed portfolio manager from Optimize are outlined in detail below, to provide you with a better sense of just how much value they could bring to you and your family.

- Financial Planning
- Investments*
- Will & Estate Planning
- Loans & Mortgages
- Insurance Solutions
- Tax Planning

* Investment advice is provided by a licensed Optimize portfolio manager

As a Senior Financial Planner, John helps coordinate your financial plan by organizing the strategy into efficient steps toward your goals. Proper Wealth Management is an ongoing process which helps you make prudent decisions about your money in order to achieve your specific goals.

Optimize Wealth Management

FOR MORE INFORMATION

Please contact:

Toronto Office
161 Bay Street
Toronto, ON M5J 2S1

Direct: (416) 555-1111
Office: (416) 555-2222
Fax: (416) 555-3333
john.smith@optimize.ca

SET YOUR GOALS. WE'LL MAKE THEM HAPPEN.