

Dundee Securities: Diversity is a strength

By Goody Niosi Writer

SURREY - For business owners and those thinking about retirement or already retired, managing their wealth can be one of the most confusing and stressful items on their agenda.

It doesn't have to be. Financial peace of mind can be as simple as finding the right investment advisor working with the right company. **Christine LaLiberté**, senior investment advisor and director, private client group with Dundee Securities Corporation, offers compelling reasons to choose her services.

DundeeWealth is Canada's seventh largest Canadian-owned, independent wealth management company that provides diversified wealth management and investment solutions including alternative and tax-advantaged products, capital markets and advisory services to financial advisors, institutions, corporations and foundations, and innovative wealth management through independent financial advisors across Canada. DundeeWealth manages \$72.3 Billion in assets and boasts a 50-year history of its own Dynamic Funds.

Dynamic Funds was rated number one in Canada for net sales at \$2.6 Billion for the past 12 months, meaning it actually earned money through the economic downturn. LaLiberté points out that as an independent advisor she can recommend many mutual funds and that Dynamic is one that she particularly loves.



From left: Ashley Johnson, Sandy Dorey, Christine LaLiberte, Jenelle Sadowski, Linda McClure, Jennifer Moulder

"They are the highest ranked mutual fund company," she says. "They have the most award-winning money managers and the most five-star rated funds."

LaLiberté offers her clients more than 20 years in the industry, the last 11 with DundeeWealth. She notes that her clients come to her through referrals and that once a client commits to working with her team, they don't usually leave. Why? Because LaLiberté's team is dedicated to helping its clients achieve their financial goals.

People who approach DundeeWealth usually have existing assets, either corporate or individual, that can range from RRSPs to non-registered investments. They usually want to plan their retirement or they are not happy with their current advisor or they are already retired and are not happy with details of their retirement income.

LaLiberté says, "Although I am an investment advisor, I

like to think of myself as a quarterback of investment advice. I gather copious amounts of information. Our first meeting is a 'getting to know you' and if people are comfortable, then we gather information."

Whether that information is simple or complex, LaLiberté and her team, including accountants and lawyers, take every detail into account. Each client receives three documents. The first is the Personal Financial Action Plan that puts the client in the position of manager while LaLiberté game plans. "I look at the areas we need to focus on and the actions we need to take," she says. "That gets brought up at every meeting. Where are we and what new actions do we need to take?"

The client also receives a Policy Statement that explains time horizon and risk versus return. LaLiberté carefully evaluates the amount of risk a client is willing to take. The policy statement is also updated regularly. The

third document is a projection: where are we now and where do we want to go and what is it going to take to get there? Like the other two documents, the projection is also updated to reflect life changes.

Does LaLiberté's system work? Client testimonials offer the most compelling proof:

"As luck would have it, Christine and her staff were recommended to us by a mutual friend. After a couple of meetings, we had quickly built a comfortable rapport. We had found a team in whom we could trust and who knew and cared about our personal and financial goals. . .Christine and the staff at Dundee Securities definitely come with my personal recommendation. I know they will look after you in a knowledgeable, caring, efficient, and professional manner." - V. Woodward, Surrey

"Trustworthy, insightful and energetic; three words that well describe Christine LaLiberté.

Her excellent performance in managing my portfolio has made it very easy for me to confidently recommend her to my work colleagues, friends, and family. Ms. LaLiberté is not just a bright, cutting edge advisor; she is a relationship builder". - S. Ribeiro, Kitimat

"We are 'snowbirds' and therefore have put our full trust in her and are very confident that she will be in contact with us if changes to our portfolio are advisable. She is very quick to reply to any queries or concerns we might have. The growth in our portfolio has been phenomenal, which we have her to thank for. We have always spoken highly of Christine and her staff to all of our friends and family." - R&E Giuliani, Cultus Lake

LaLiberté says there are thousands of mutual funds and stocks out there and too many advisors are focussed purely on investments. "I can recommend some of the same funds as the person down the road. It's how you put them together and how focussed you are on the portfolio - that's going to make the difference."

"I love helping people," LaLiberté says. "It's not just about the money, it's about the people. And we have our team and our peripheral experts - the level of service that we provide here is second to none."

The DundeeWealth LaLiberté team is at 309 - 5455 152 Street in Surrey www.insightfulwealthsolutions.com

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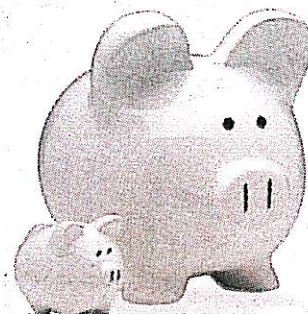
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