RICHARDSON GMP

WRONSKI CANN
RETIREMENT SPECIALISTS

OUR SPECIALTY
YOUR RETIREMENT.

How We Help You Achieve the Retirement You Want.

ABOUT WRONSKI CANN

We are **Retirement Specialists** and wealth solutions providers. We assist our clients and their families with making prudent decisions in building their investments and protecting their assets.

Our team is comprised of Wealth Advisors **Kathleen Wronski** and **Michael Cann**, Associate Investment Advisor **Jorge Saban Jr.**, and Marketing Assistant **Alison Seto**. Combined we have over 50 years of experience in the investment industry which gives us the ability to better serve our clients and benefit from each other's expertise.

As a team we have helped hundreds of people - just like yourselves - build, maintain, and realize their financial goals. Whether our clients are nearing retirement or fully retired, we have the expertise and tools to allow them to retire with confidence.

STRONG HISTORY

Richardson GMP is the combination of two powerful partners: Richardson Partners Financial and GMP Capital Inc.

The Richardson name is one of the most respected names in financial services, with a legacy that dates back to the 1800's. GMP Capital Inc. is a proven capital market leader known for its innovation and service excellence.

Richardson GMP is Canada's largest independent wealth management firm, entrusted with over $28 billion in client assets. We are commited to delivering unbiased and unparalled wealth management solutions.

OUR PROCESS

IDENTIFY YOUR GOALS AND OBJECTIVES

To create the right plan for you, we develop a full understanding of your family background, priorities, goals and aspirations.

PERSONALIZED WEALTH AND RETIREMENT PLAN

Based on your goals, objectives and resources, we will draft a personalized wealth plan and retirement plan that we believe best suits your needs.

IMPLEMENT INVESTMENT STRATEGIES

With your approval, we recommend and implement the best strategy to meet your needs. We ensure that we have fulfilled all your needs and that you are comfortable with our recommendations and strategy.

MONITOR, EVALUATE, AND REVIEW

The progress of your wealth plan will be thoroughly monitored, evaluated and reviewed on a regular basis. With your approval, we will adjust your strategy based on any changes to your lifestyle, goals, and objectives.

WHY CHOOSE WRONSKI CANN

Choosing an investment firm is a difficult decision for investors. It is one that should be made with the utmost care and discretion, as it impacts not only you, but your family and future generations.

It starts with a great Advisor. A professional who will put your financial goals above all other concerns and who has the wealth management talent and acumen required to help you reach them. Because when it comes to wealth, it's not about how much you have—it's about what it can help you achieve. It's about controlling what you can and protecting what you can't. And that's our expertise.

1 OUR SPECIALTY

As Retirement Specialists with over 30 years of experience, we help our clients plan for and invest in retirement. We specialize in wealth and retirement planning and believe in a balanced and diversified portfolio strategy.

We create a tailored wealth and retirement plan for you and implement strategies designed to deliver results while maximizing returns and minimizing risk.

2 KEEP YOU ON TRACK

It is a long journey to retirement and staying on track throughout this journey can be a challenge.

We work with you to create a personalized Retirement Roadmap for you and periodically review your retirement income projection. This will allow us to provide you with the steps to financial well-being, and keep you on track to a comfortable retirement.

3 TRUSTED ADVISORS

Financial and retirement planning is about more than the annual returns your investment funds are generating, it's about developing a relationship based on trust and integrity.

We hold ourselves to the highest standard of care and as such, our clients are the focus of everything we do.

4 FULL DISCLOSURE

We ensure there is full disclosure of our investment recommendations and how we are compensated for the work that we do.

We aim to answer questions that you may have, specifically: 1) How are my investments doing? and 2) How much are my investments costing me?

5 ENHANCED ASSET SAFETY

Asset safety is a top priority at Richardson GMP. That is why we implement corporate governance best practices and adhere to the stringent rules and regulations set by our regulatory bodies.

We have additional securities protection, with Lloyd's of London and CIPF, with combined coverage up to $2 million. We are committed to protecting what's important to you.

6 BEST IN-CLASS RESEARCH AND IN-HOUSE SPECIALISTS

We have access to global investment research firms to help us identify opportunities and manage the impact of evolving situations.

We also have access to our in-house tax and estate planning professions such as lawyers and accountants, who help us address specific needs including tax and estate planning, insurance, and succession of businesses.

WHAT CLIENTS ARE SAYING

Testimonials from our clients

"Kathleen has been our financial planner for many years. She is very approachable and knowledgeable and gives sound straightforward advice.

She combines her professional approach with a sensitivity to her client's personal situation and is always ready to assist and answer any questions.

As newly retirees, we met with Kathleen to map out our retirement plan. We are very confident that under Kathleen's guidance, we will have enough retirement income to thoroughly enjoy this new chapter in our lives.

We would highly recommend her and have referred others to her, with very good results."

- Ted and Gail, client for more than 15 years

"Kathleen has been our financial advisor for over twenty years. She has helped us plan for retirement by assisting us in making investment choices that increased our assets and that we were comfortable with.

Kathleen is very knowledgeable about finances and the markets and explains her recommendations in "layman's" language.

Now that we are retired, we are able to maintain our lifestyle with a portfolio that gives us tax efficient income. We feel very fortunate to have the benefit of Kathleen's financial expertise."

- Jean & Don, client since 1992

YOUR INVITATION

Retirement income is just the start, there is also maintaining your lifestyle, minimizing taxes, protecting yourself against adverse circumstances, and passing on your legacy.

That's where we can help. We can arrange a brief consultation at our offices. This is our opportunity to fully explore all aspects of your life to understand how we can assist you; at this stage we will listen to your concerns, ideas, and thoughts.

We invite you to call or email us to arrange a meeting and discuss your retirement goals.

Contact us and Retire with confidence.

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