

Investment Solutions

Optimal returns for your investments!

We will draw up an investment policy to provide a framework for your investments, reduce uncertainty and optimize returns, based on your objectives.

Our offer:

We will make you an informed investor.

Whatever your investment objectives or portfolio size, we will help you optimize your financial situation. Using a proactive approach, your advisor will:

- Determine your investor profile
- Set your investment objectives based on your risk tolerance and required returns
- Review your current asset mix
- Analyze the type of income required as well as its tax impact on your financial situation
- Identify possible constraints for your investment strategy, particularly legal, tax and estate planning problems
- Propose the most appropriate investment vehicles as well as the most effective mix
- Indicate the optimal asset mix for achieving your objectives
- Adapt your portfolio to the projects you wish to undertake

We add value

By minimizing the risks related to your portfolio mix and by ensuring that your objectives are achieved. To do so, we will monitor your portfolio continuously and review it periodically based on the selected asset mix.

Our financial planners are registered under the licence of National Bank Securities, a wholly-owned subsidiary of National Bank of Canada.

Because you are unique