

A day in the life of Legacy Partners

We like to keep things understated and let our actions speak for themselves. No surprise there, as you do much the same. So, like the hard working duck on water story, a lot of what we do for our clients can go unnoticed. In this Legacy Letter, we go beneath the surface, to shed some light on those numerous activities which are so important to the value we deliver to our clients. So join me now for

'A day' in the life of Legacy Partners.

Our office officially opens at 9am. But Michele arrives well before that. As you know, I'm no early-bird (but I do work nights). So when I arrive, Michele has already opened the shop, parsed our new messages, and is ready to bring me up to speed. This drives our list of initial activities for the day. Of course, being a close knit group, we make time to catch up on recent "happenings". There always a good story to share about an evening outing, a travel mishap or mismatched shoes. 'Life happens' to us all, so it's great to start the day with a chuckle.

Of course, my day actually starts before 9am when market news is digested along with breakfast. Some days there's a lot to swallow, and some days that causes a little 'Trumped-up-indigestion'. Still, it's an important part of our value proposition to you: finding the real nuggets of important information, by sifting through the ever increasing wave of shock 'n awe headlines or fake news. Staying current is key to answering your questions knowledgeably and with compassion.

For greater efficiency, we strive to keep case preparation days separate from client meeting days. By staying focused, we can perform at a higher level and deliver better results to you. Other professionals do the same. To be at their best, Actors and Athletes follow different routines on game day, then they follow on rehearsal days. Separate days for preparation are important for everyone.

Everything we do, is focused on client service and is built into a process which is systematized to ensure reliability and repeatability. That is why we have full confidence in telling you, ***'Yes, we can and will follow through on our commitments'***. Booking your review meeting is a good example. Here's an overview of that particular process.

You know your scheduled review month, so we know you're counting on hearing from us! With our systems reminding us who is due up next month, Michele and I review that list along with our notes on everyone's personal financial plans. This discussion allows Michele to contact you (starting with our light-hearted invites) to book a meeting but also assure you we are organized and ready to help. Together you and Michele cover reminders of items to bring and capture new questions you want to table. Our goal is to hold 3 client meetings a day (totaling < 10 per week) as this provides sufficient time for meaningful client conversations and for us to fully document our findings & next steps. Taking time to make good notes allows us to provide substantial value to you throughout the entire financial planning process.

With review meetings booked, next-steps are then logged into our calendars and soon, our base

Time to Meet...

*We know, anyone can have
a bad-hair day,
but... we'd still like to see you.*



*It's time to meet with Tim
for your regular
Financial Planning review.*

Remember: Always give 100%... unless you're giving blood!



One of our light-hearted meeting invites ☺

*Each of us builds our own Legacy one day at a time, through the people we love,
the work we do, and involvement in our community.*

activities for the month are clearly defined. Of course, we maintain flexibility in our calendars to accommodate client calls on urgent matters. But given our planning focus, most clients are able to call ahead and afford us time to address their questions thoroughly. Which we greatly appreciate!

Preparing for your review meeting is, you guessed it, another process. Michele knows when to compile your material and prepare our well liked one-page summaries. We update illustration systems and review investment portfolios from top to bottom. I spend time analyzing results while refining and running projections. My goal is to cover as many 'what if' scenarios as I can to a) ensure your current plan is still meeting the desired goals, and b) prepare for possible questions you may ask. It's much like studying for a test. The more we prepare ahead of time (no last second cramming here!), the more we learn and the better the results are we deliver.

On other days, we focus on business planning. This is where we apply the same financial planning principals to our business practices. We review our processes, research new solutions, study industry trends and meet with our business coach. Yes, I too have hired a professional to help us review and refine our business, just as you have hired us for your financial planning. We really do practice what we preach. We believe we can ALWAYS improve on our processes (as even minor tweaks can have major long-term benefits) and thereby provide you with even better service. We set aside time each quarter to do just that.

Ongoing education is another regular activity at Legacy Partners of London. Each year I attend multiple conferences spread all over Canada. While I enjoy hearing new perspectives from quality speakers, I most enjoy the interaction with fellow attendees. It is in those deeper conversations that real learning occurs. You can find a summary of my 2016 education on my blog.

Friday is a wrap up day. Much like the end of every day, lists are checked, final documentation done, and unfinished items are logged for follow-up. At the end of the week, the process is more extensive as I search the week for lessons, trends, and common themes. Many of these turn into my next blog entry so I can regularly share our knowledge with you. Writing has long been a passion of mine. In addition to being a good way to converse with clients, it's been a therapeutic process for me to sort out my thoughts/feelings and to reinforce what I've learned. It's also a lot of fun, so I hope you get a chuckle out of them while learning a little bit too.

We have other processes that are valued by our clients. These include, but are not limited to, mailing a birthday card and gum to our clients' minor children who hold Education saving plans. This is a lot of fun for us, and really, who doesn't like getting a gift in the mail? We also have our ever popular personalized exit strategy for clients. Putting funds into a savings plan can be easy compared to taking them out, so our process provides an understandable process for clients to do both.

These are just a few of the value added processes we have implemented at Legacy Partners of London. If you have suggestions for revisions or additions to our services, we'd love to hear from you.

If there is someone you care about who may get value from our services, please give them the enclosed *Introduction PostCard*. We believe in people helping people, so please know, we are here to help you help others. Together we can make a real difference in the world by leaving people better than we found them, each and every day.

The information in this letter is general in nature. You should consult your Financial Advisor before making changes to your investment plan.

www.LegacyPartners.ca

Legacy Partners of London Inc

You can reach us at:

#150 - 633 Colborne St.

London ON N6B 2V3

Phone: 519-518-2025

between Central Ave & Pall Mall St

Financial Planning for People with a Purpose !

Our Passion...

We believe there is no greater purpose in life than to leave things better than you found them. If everyone did this, day in and day out, what a wonderful Legacy that would be. A person's Legacy can take many different forms - spending quality time with your family; building a business you can be proud of; or helping a neighbour in need. At Legacy Partners of London, we believe everyone has the potential to achieve their greater purpose and we work closely with our clients to help them Create and Conserve their Legacy.