

Portfolio Management



Stock, Bonds, ETF's Professionally Managed

Develop and optimize your portfolio with help from our Chartered Financial Analysts (CFA). We have retained Provisus Wealth Management, a nationally licensed portfolio management firm, to provide our clients with a professionally managed portfolio service.

Through an in-depth conversation about your financial goals, our CFAs can help you identify and buy the investments that are right for you, and manage/trade them as appropriate. It is their responsibility to achieve results for you

through professional wealth enhancement and risk management strategies.

Benefits of your customized portfolio include:

- Tax deductible portfolio management fees on non-registered accounts
- Stocks and bonds electronically traded specifically for you, in your name
- 24/7 online viewing of your account and transactions

*It's part of my added service to you
at no additional cost.*

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FINANCIAL GROUP

Retirement Income Guaranteed



Spending your RRSP shouldn't be stressful

You worried that you wouldn't put enough in your RRSP, but here you are in retirement. Now it's time to enter the drawdown phase, when you get to enjoy the fruits of your labour. With this stage comes its own worries – Will you run out of money too soon? Will market fluctuations reduce your nest egg? Will inflation seriously erode your funds?

At Roche Financial Group, we have a guaranteed strategy that will enable you to spend your retirement savings smartly – so you can avoid the worry and start enjoying.

Call or visit us today!

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