

# THE APEX PROCESS



GOALS + PERSEVERANCE = HAN-EI  
(MOST PROSPEROUS)

Review your progress regularly.

By transforming knowledge into wealth,  
a prosperous relationship is born.

The result? Han-Ei.

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THE ASCENT BEGINS

Work toward your dreams by implementing  
recommended strategies.

5

4

THE COACH'S CORNER

Discuss how our investment and estate planning  
strategies will help your dreams become reality.

THE TRAINING

Assess information and develop  
recommendations to help  
facilitate your dreams.

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2

THE DREAM

What is important to you and why? How can we best serve you?

Gather your information, including existing account  
statements, Will, insurance policies and names of other  
advisors i.e. lawyer, accountant, family member/friend, with  
whom to consult if necessary.

1

THE CHALLENGE

With challenge comes the opportunity  
for reward. Those who inspire, such  
as a hero of mine, earn that reward by  
knowing what is important and by  
staying the course.

That same dedication is necessary to  
build financial dreams. Our client  
service agreement outlines our  
commitment to you and our dedicated  
approach to achieving your financial  
success. In return, we ask for open  
communication, a willingness to learn  
and reasonable financial disclosure

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Assante Capital Management  
Ltd. is a member of the  
Canadian Investor Protection  
Fund and is registered with  
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