

Professional Investment Advice

Experience
a new level of
collaboration.



Partnership Plus



ScotiaMcLeodTM

The Path to Financial Success

From 24-hour news channels to book stores full of how-to guides, it's easy to find information about investing. The hard part is determining how to use that information to structure an effective investment strategy to reach your personal goals. That's why ScotiaMcLeod developed Partnership Plus, an investment program that relies on a proven approach that can help you achieve financial success. Working with your dedicated ScotiaMcLeod advisor, we develop tailored solutions designed to help you enjoy financial well-being by taking all of your needs into account.

The Partnership Plus Approach

Your ScotiaMcLeod advisor works with you to gain an in-depth understanding of your financial objectives so we can help you:

- Structure a long-term plan
- Build a tailored investment strategy
- Ensure your estate is in order
- Protect your assets and income over the long term
- Meet the ongoing needs of your children or parents



Comprehensive Solutions

While an investment strategy is a key element of your financial arrangements, we understand that your finances are about more than your investments. That's why our solutions take all of your needs into account – from retirement and estate strategies, to income protection and multigenerational planning. This is the true measure of the strength of the Partnership Plus program. Through a process of exceptional collaboration, your goals become our guideposts. As a result, we are able to offer advice that is relevant, strategic, and reflective of your personal situation.

The Benefits of Ongoing Advice

The advice we offer you does not stop with an investment strategy. The ongoing expertise, guidance, and professional advice provided by your ScotiaMcLeod advisor is complemented by our team of top-ranked[†] investment specialists. For an annual fee, your advisor gives you the help you need to make informed investment decisions, and conducts regular reviews of your portfolio to ensure your financial strategy stays on track. Plus, you receive Investment Portfolio Quarterly, a publication written by our experts and developed exclusively for Partnership Plus clients. We are focused on collaborating with you to make suitable recommendations based on your unique strategic goals.

Building Relationships for Life

† As identified in rankings conducted by a prominent, global financial research firm.

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