

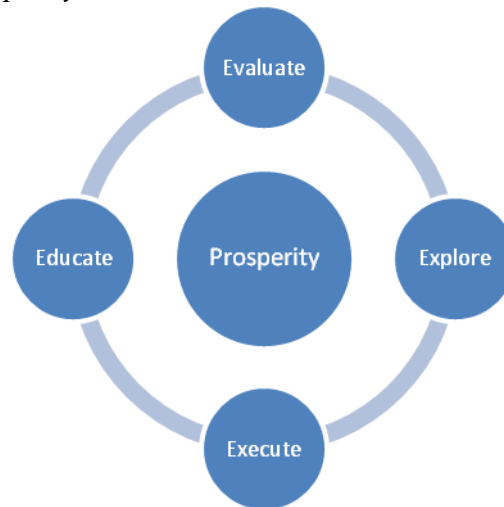


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Corcoran & Partners
Today, Tomorrow, Together!

Partnering With a Financial Advisor

Corcoran & Partners of Assante Capital Management Ltd. understand that choosing to enter a partnership with a Financial Advisor can be an intimidating process. Therefore, in order to assist prospective clients in entering a partnership that is the correct one for them, Corcoran & Partners have developed a process that we believe empowers prospective clients. This process is what we refer as the *Four E's to Prosperity*.



Evaluate: To begin to evaluate your needs, we encourage you to develop a list of short term, midterm, and longer term financial objectives. Once this has been completed, it is important for you to determine what approach you would like to take to the financial market place, e.g. low, medium, or high risk approach. This will help you to decide what financial products are best suited to your market sensibilities.

Explore: There are a multitude of different Financial Advisors. However, before you meet with a prospective Financial Advisor, you should have a clear understanding of not only what you value, but what your expectations are in a prosperity-building partnership. This understanding will help you to determine with whom you should partner as any partnership needs to be based upon shared values and expectations.

Execute: To determine which candidate is the most suitable for your prosperity-building partnership, try to determine which candidate most closely shares your values and expectations based upon the answers they provided to the questions you have asked. Once you have identified the Financial Advisor you would like to partner with, reschedule a second meeting and begin the process of formalizing your relationship.

Educate: The key to any successful prosperity-building partnership is the educational relationship between the Financial Advisor and the client. The more a Financial Advisor shares their knowledge with their client, the stronger the relationship with the client will become as the client will be in a better position to work with the Advisor to bring the short term, midterm, and longer term plan of prosperity to fruition.

If you would like to learn about the advantage of entering a prosperity-building partnership with Corcoran & Partners, please do not hesitate to contact us or visit us at www.seancorcoran.ca.

Assante Capital Management Ltd. is a member of the Canadian Investor Protection Fund and is registered with the Investment Industry Regulatory Organization of Canada.