CIBC Wood Gundy

The Michael Fahy Group

Professional Wealth Management

FINANCIAL GOALS

Helping you achieve your goals, one step at a time.

Our Mission

Our Mission is to help our clients achieve their financial goals using a strict, comprehensive process that is designed with the end result in mind. We believe it is about the **process and the big picture** that creates success – not what happens in the short term.

My Values & Beliefs

Integrity is our greatest pledge to our clients. You will be given the highest quality advice, tailored around your individual circumstances. Our practice is about **Caring** for the people who entrust us to aid in the ongoing management of their assets while being **Accountable** for our actions and always doing what we say we will. We believe in exhibiting the highest level of **Professionalism** in all aspects of our practice while holding all information placed in our care with absolute **Confidentiality**.

Our Services

Discover What We Do Differently

A client's financial needs go far beyond just investments. Worthwhile goals take time and planning to reach. To bring our clients' **long-term goals closer**, we help you analyze your current financial situation and create a consolidated, cohesive financial strategy.

In conjunction with our team of experts, we will develop a **complete strategy** that encompasses your entire financial situation. When deemed necessary, we will call upon our team of experts to **implement specific strategies** that take care of your asset protection, will and estate planning, and banking and borrowing needs.

Reaching Your Goals

On a quarterly basis, **we review the progress** our clients are making towards their goals in order to make any necessary adjustments as required to achieve the overall plan. Our goal is to provide you with an **unparalleled level of service**. Finding the solution to your financial needs is our foremost focus.

Discretionary Management

Managing Your Portfolio

Discretionary Portfolio Management is the **management of a portfolio** by a portfolio manager at his or her discretion based on a specific set of criteria. I have spent over **25 years in the investment field** and during that time I have witnessed a variety of investment ideas and products of the day. Some of the new ideas have staying power because they have merit while many disappear as quickly as they appear.

I have spent many years developing a disciplined investment philosophy and principles that guide my **decision-making process**. In addition, I have had to pass a rigorous academic, application and review process to achieve the designations that I currently have. The result is that as a discretionary portfolio manager I can bring all of these attributes forward to **benefit my clients and their families**. We will invest the time necessary and our full expertise to understand your financial and lifestyle priorities, design a documented investment policy statement and execute day-to-day investment transactions on your behalf. The end result is a **professionally managed portfolio** designed just for you.

Disciplined Portfolio Management

Our Six-Step Process

One of the greatest rules relating to investing is adhering to **a strict discipline**. Markets around the world change very quickly and the difference between a below average or above average return can be simply the discipline with which decisions are made. Over the years I have developed a disciplined **six-step process** that I use with every client.

- **Step One –** Evaluate Goals & Objectives
- **Step Two –** Risk Assessment
- **Step Three –** Create a Personal Investment Policy Statement
- **Step Four –** Develop Portfolio
- **Step Five –** Ongoing Monitoring and Evaluation of the Portfolio
- **Step Six –** Reporting on Progress

Contact Us Today: 604 691-7207 or Toll Free: 1 855 220-9662
www.themichaelfahygroup.com
1055 Dunsmuir St. Suite 2434 PO Box 49184
Vancouver, B.C. V7X 1K8

Michael B. Fahy, B.Comm, CIM, FCSI
First Vice-President, Portfolio Manager