



# AffinityCapital

## MANAGEMENT INC.

### YOUR MONEY, YOUR GOALS, YOUR VALUES

#### Our Approach:

Initial Meeting: About Affinity Capital	<ul style="list-style-type: none"><li>• A 45 minute free, no-obligation, "Get to Know Us" Meeting. You can learn more about our approach and we can outline our qualifications, experience and fee structure.</li></ul>
Step 1: Your Current Situation	<ul style="list-style-type: none"><li>• Once you are completely satisfied and ready to work with Affinity Capital, we will begin collecting your personal information and assess your current financial situation. Also, we start exploring your relationship with money.</li></ul>
Step 2: Explore Your Goals and Needs	<ul style="list-style-type: none"><li>• Now we help you identify your needs and goals. Not just financial goals but your personal goals and what role your financial plan will play in achieving those personal goals. Remember, YOU are in the spotlight not the financial plan.</li></ul>
Step 3: Prepare a Written Financial Plan	<ul style="list-style-type: none"><li>• Once there is a comprehensive understanding of your current situation and what we need to achieve in the short-term, mid-term and long-term, we prepare a fully integrated financial action plan incorporating your money, your goals and your values.</li></ul>
Step 4: Present Financial Plan to Client and provide Advice	<ul style="list-style-type: none"><li>• We are now ready to sit down with you and go through every aspect of the plan and answer any questions you may have. The plan will provide you with a step by step action plan that you can implement with your current advisor or let Affinity Capital assist in implementing it. The choice is yours.</li></ul>
Step 5: Implementation of the Financial Plan	<ul style="list-style-type: none"><li>• Affinity Capital, with its portfolio management partners, assist you in implementing the financial plan, we will take the necessary steps in executing your plan and provide you with guidance as required.</li></ul>
Step 6: Periodically Review/Monitor/Update the Financial Plan	<ul style="list-style-type: none"><li>• This step is probably the most important step of all. Putting a plan together and executing it is great. But if you do not monitor or update it on a timely basis, it is all for nothing. Remember, life happens, so your financial plan has to reflect changes in your life as they happen. It is essential to have a financial professional monitor your progress and fine tune your plan as needed.</li></ul>

The exploratory meeting is always free and there is no-obligation.

Let's talk and see if Affinity Capital is right for you.

You can reach me at 416-333-8625 or email: [anup@affinitycapital.ca](mailto:anup@affinitycapital.ca)

[www.affinitycapital.ca](http://www.affinitycapital.ca)