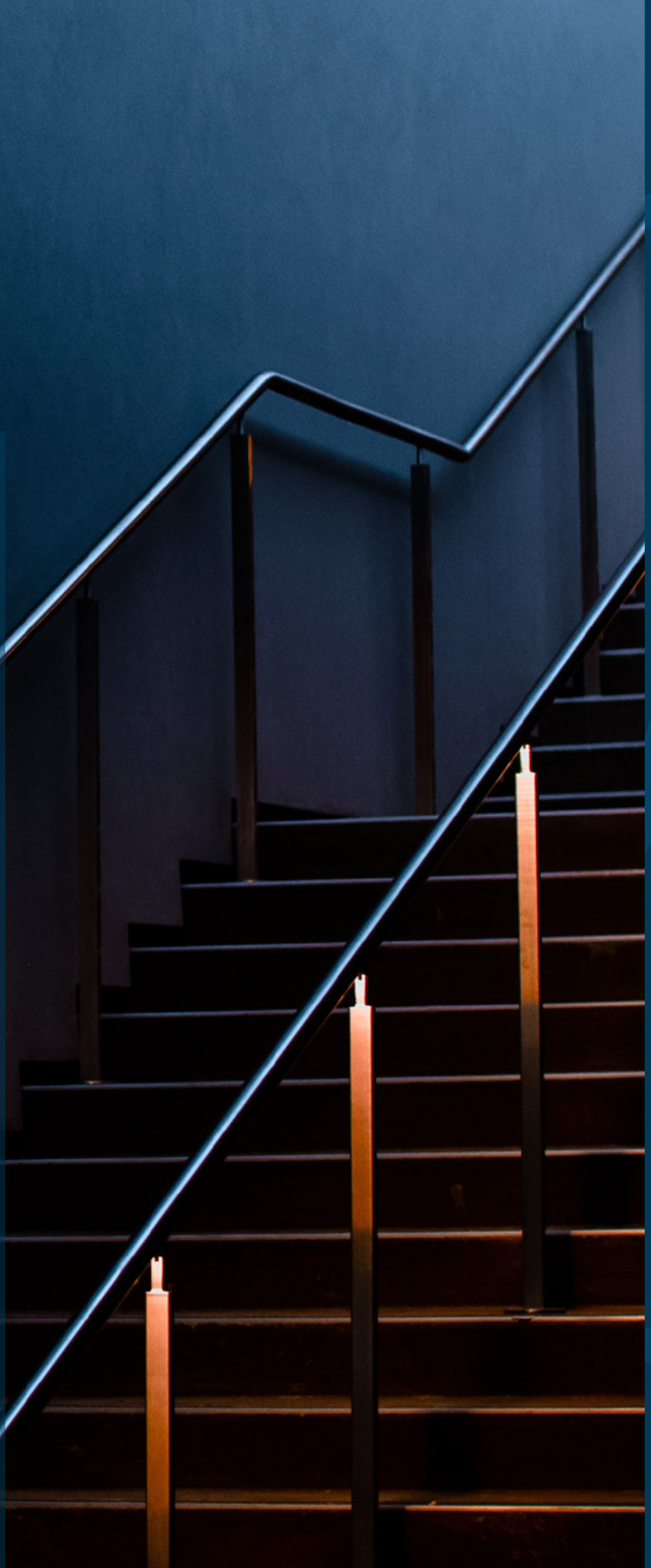
ASPIRE
WEALTH GROUP

INVESTED IN YOUR JOURNEY

OUR INNOVATIVE
5-STEP PROCESS

ALIGN. DESIGN. ACHIEVE.



Our innovative, 5-step process has been curated by our team of expert advisors to provide comprehensive financial solutions that are rooted in the best interests of our clients and empower them to accomplish their lifelong financial goals.

At Aspire Wealth Group, we provide proactive advice and planning designed to build and protect your family's net worth. Our team of industry-leading wealth advisors are passionate about creating solid financial futures for our clients and their families.

The well-being of our clients means everything to us. We offer a highly personalized level of service and a "one-stop" solution that includes investments, insurance, mortgages, banking, income protection and retirement planning.

Through an innovative 5-step planning process, our advisors guide clients through a streamlined approach to understand their goals, values and will customize a plan that fits their lifestyle and dreams.

Here's how it can work for you.

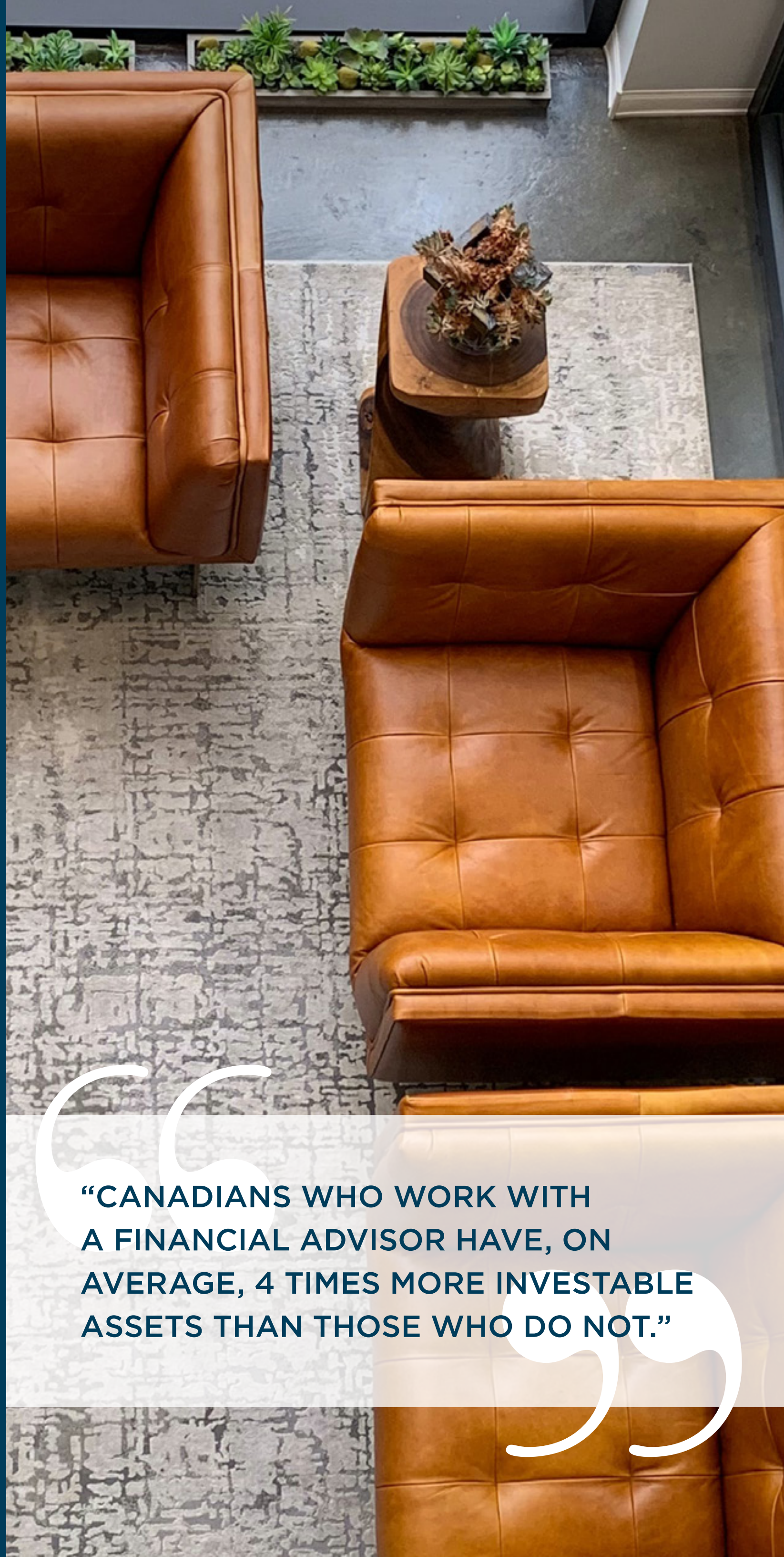
THE DISCOVERY.

STEP 1

This is where we get to know each other by understanding your current financial situation and what is important to you. This meeting can be in person or virtual, and we will discuss the following:

- Your short and long-term goals when it comes to your finances, spending and retirement
- The planning process and which areas relate to your current situation
- How our advisory fee structures work
- If there is a fit

What to expect: 30-minute discussion



"CANADIANS WHO WORK WITH A FINANCIAL ADVISOR HAVE, ON AVERAGE, 4 TIMES MORE INVESTABLE ASSETS THAN THOSE WHO DO NOT."

“PROFESSIONALS AND BUSINESS OWNERS WITH A PLAN ARE MORE CONFIDENT THAT THEY WILL HAVE ENOUGH MONEY TO RETIRE COMFORTABLY.”

THE ASSESSMENT.

STEP 2

Based on the information provided to date, we will meet to review your NetWorth sheet. Understanding your cash flow and net worth will help guide the plan to meet your financial goals.

What to expect: 30-minute discussion

PLAN. PROFIT. POWER.

STEP 3

Once we have completed the assessment, we will present our customized recommendations to achieve your goals. Your input is essential, and together we will ensure that we set the right plan in motion.

What to expect: 60-minute discussion

TAKE ACTION.

STEP 4

Now that we are invested in you, we can start building and protecting your wealth. Together, we will complete all necessary forms to put your plan in place. Most importantly, we'll answer all your questions to ensure you feel confident in implementing the first phase of your plan.

What to expect: 30-minute discussion

EMPOWER YOUR FUTURE.

STEP 5

Your success is essential to us, and you will have access 24/7 to a dashboard of your accounts. We will schedule annual meetings to review your plan to ensure we're on track in accomplishing your goals. We know that as life changes, so does your financial plan.

Aspire Wealth Group is invested in your journey.

"81% OF INDIVIDUALS WITH A PLAN FEEL THAT THEY ARE ON TRACK TO REACH THEIR FINANCIAL GOALS COMPARED TO 44% WITHOUT ONE."

ASPIRE
WEALTH GROUP

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