



## A Tale of Two Brothers

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Brode and Marcus set out on the choppy seas to try their hand at investing and reach financial freedom.

They aim for the same destination but choose different routes. Brode is a 'do it yourself investor' and decides to go with a large national bank; while Marcus chooses to sail with an advisor.

The large bank gives Brode a choice of three ships. Brode selects the one he thinks best suits his needs. The bank hands over the boat with a long, heavy instruction manual. Done! It seems that Brode is ready to set sail. Let's check in with Marcus.

Marcus, equally unfamiliar with the investing seascape, chose LGK Wealth Management to aid his navigation. Hmm.. what do they offer him?

Compared to Brode's range of product options, it seems that Marcus' choice is unrestricted. LGK wealth management regularly researches and reviews thousands of investment products. They pack their inventory with the best products available to personally assist Marcus in finding the product that best suits his needs. They even help him determine how much he will need to retire successfully.

Wow! Marcus is prepared. But, let's see how they move! The two set sail and venture into the market!

Off the dock, it seems that Brode has already run into a problem. He does not know which direction to head. He tries to call in for help but each time is put on hold. Once through, he is transferred from anonymous support staff to anonymous support staff, each time having to re- explain his question, losing him valuable time and energy.

Whereas in Marcus' case, LGK Wealth Management is right there with him, offering direction, suggestions and advice. They help steer Marcus' boat in the direction towards financial freedom. They provide regular progress updates and make changes to his portfolio based on the markets. It seems that Marcus' boat is really on-course. LGK Wealth Management is on top of his every move, serving as an expert personal assistant on his journey.

Let's check out the results!

Not only was Marcus' boat faster, being individually customized towards his investing style and personal goals, but thanks to the added personal assistance of LGK Wealth Management, his course was far more efficient as well.



As for Brode, not only is he far behind, but he has grown frustrated. It seems no one at the large bank really cares if he reaches his destination. His boat sails like a generic, one-size-fits-all vehicle rather than something made for him.

When Marcus arrives at financial freedom, LGK Wealth Management will continue to service his ship, give options on new ventures and opportunities, and ensure that his wealth works towards its full potential.

Your LGK Wealth Management Team,

[Gary M. Koss](#) | Senior Mutual Funds Advisor

Manulife Securities Investment Services Inc.

Life Insurance Agent | LGK Wealth Management

Manulife Securities Investment Services Inc.

Email: [gary.koss@manulifesecurities.ca](mailto:gary.koss@manulifesecurities.ca)

Phone: 780-426-2400 | Fax: 780-423-0311

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