ALIGNED
capital partners inc.

LGK
INVESTMENTS

The Investment Advantage

LGK Investments of Aligned Capital Partners Inc.

What is the Investment Advantage?

The Investment Advantage is a culmination of the products we offer, as well as the exceptional service and care that we provide in all client dealings.

As LGK Investments of Aligned Capital Partners Inc., we offer many services to help our clients achieve their financial goals. We are independent, unbiased, and always recommend investments based off client needs and suitability.

Our mission is to assist our clients with innovative product solutions and provide lasting value by offering the very best service and advice the industry can provide.

Who We Are

LGK Investments of Aligned Capital Partners Inc. was created by Gary and Lexy Koss with the vision to help others achieve financial success through a comprehensive and specialized approach to the Wealth Management planning process.

We are more than just another name in the financial industry, we are a family of advisors and staff who utilize our strengths as a team to provide our clients with the best service possible. We work openly through a shared vision and goals which enable us to deliver greater success to our clients.

Everyone must begin their financial journey at some point and any journey is made easier with the help of a guide. That is exactly what we are here to do – we guide our clients along their journey to financial success. The relationships we build with our clients allow us to provide them with a unique investment experience.

What Client Care Means to our Team

Client care is the defining factor in the financial industry. Given the thousands of investment choices available, we believe that the client care we provide is what sets us apart from traditional investment advisors.

We are committed to remaining transparent, putting clients first, and delivering personalized service to every client. We conduct business with integrity and provide recommendations that are best suited to our clients' needs. Research is an integral part of our Portfolio Management process allowing us to customize investment portfolios for our clients.

Who Do We Work With?

We assist any client regardless of age, net worth, or investment experience.

Whether opening an initial investment account, saving for a child's education, or preparing for retirement, our goal is to be an integral part of our client's lives and the main point of consultation for all life decisions.

What Services do We Offer?

We offer solutions catered to the individual and designed to focus on the level of growth and income required by the client. Each client receives a customized portfolio. We offer access to a multitude of investment vehicles through Aligned Capital Partners Inc. such as Mutual Funds, ETF’s, Stocks, and Bonds. Each of the services we offer undergoes our thorough research process to ensure that each client receives an investment experience tailored to them.

The LGK Process

We begin our process by meeting with our clients to gather the information required to make informed recommendations regarding their financial wellbeing. Our goal is to ensure that we are always using products that will align with each client's individual needs. We have periodic meetings with investment companies to make sure we stay up to date on all the products we recommend to clients. We analyze the current market conditions and ensure that the investment options provided are well positioned. Lastly, we aren't a "set it and forget it" advisory team, our research team reviews accounts quarterly to ensure that each client is within their appropriate risk tolerance and asset allocation.

We pride ourselves on the research process that we undertake to ensure all clients are positioned correctly for the markets ahead.

Who is Aligned Capital Partners Inc.

Every advisory office is required to choose a dealer to facilitate trading, client statements, and custodial responsibilities. We have chosen Aligned Capital Partners Inc. due to their forward thinking and strong technology platform.

Aligned Capital Partners Inc. is focused on helping advisors to better their business through strengthening client relationships. This is done by giving advisors the tools necessary to increase efficiency within their practices. Aligned Capital Partners Inc. has been able to make processing more reactive and responsive to client schedules through the ability to digitally sign documents. This increases flexibility for both the client and advisor, as well as giving an overall sense of ease.

Aligned Capital Partners Inc. also offers a very client friendly online portal. This allows clients the ability to access their investment information at any time or place, meaning clients can better monitor their investment progress to achieve a better understanding of their accounts.

Aligned Capital Partners Inc. takes both the advisor and client's perspective into consideration in order to continually improve their offerings. This ensures that everyone involved is always provided with the best possible investment experience.

Meet the Advisor

Gary Koss, BComm, CIM, FCSI®

Gary has worked in the financial services industry for over 25 years, holding a variety of financial positions within the banking and investment industries. In 2014 he made the change to join his wife Lexy to become an Investment Advisor. Gary recently completed his FCSI designation through the Canadian Securities Institute in 2021.

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Feel free to reach out to our office to see if we can help you along your financial journey.

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"Successful investing is about managing risk, not avoiding it."

– Benjamin Graham

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