seize **your** future

CFAL Private Wealth Services

Build a financially secure future with a solid investment portfolio

Private Wealth Services

In our ever changing market environment, individuals often need qualified guidance for their investments. CFAL provides a comprehensive array of investment products and services to domestic and international investors including purchase and sale of securities, trading and market insight, payments and transfers, cash management and custodial services. Our combination of competitive fees and outstanding professional service sets us apart from other firms. Our Private Wealth Services puts our individual and institutional clients at the center of managing their investments and facilitates specific investing and trading instructions with the unique expertise of CFAL as their guide. We know that every individual and organization has different needs, so we work closely with our clients to develop customized solutions that draw on our expertise.

Investment Management Accounts (Discretionary & Advisory)

Our Investment Management options allow us to monitor your portfolio and provide customized and professional analysis and solutions for your holdings in fixed income, equities, alternatives, real estate and other related investments. This type of account generally requires a minimum dollar value of assets under management because of the level of service associated with this type of account. Our investment management team works closely with the research department to provide security recommendations based on your goals, investment objectives and agreed trading constraints. Our Investment Management options are tailored to your needs, whether you would like to be hands-on with your investment selection through advisory services or whether you would like discretionary services. The CFAL Personal Investment Advisor monitors portfolio performance and will provide detailed quarterly analysis.

CFAL Private Wealth Account

	TYPE OF ACCOUNTS	
	Standard Private Wealth Account	**Investment Management Account**
Relationship	Trading only	Discretionary or Advisory and Trading
Reporting	Quarterly portfolio appraisal that includes activity summaries, investment holdings, transaction history and online access	Personal Investment Advisor monitors portfolio performance and will provide you with detailed quarterly analysis and online access

Benefits

- **Ease of trading –** Reduced paperwork on local trades. No more transfer forms or signature guarantees. Just give us your instructions and we effect the trade.
- **Reduced commission on trades**
- **Client communications –** Weekly Market Update, Quarterly Newsletter, Company Valuations and Recommendations.
- **Personalized Customer Service**
  - Primary Client Relationship Officer
  - Financial & Retirement Planning
  - Cash Management & Related Services
- **Online Account Access**
- **Access to Public & Private Deals**
- **Automatic Money Market Sweep –** monthly cash balances including dividends, interest and proceeds from sales can be automatically invested into a money market mutual fund earning an attractive, competitive interest rate.

Investment Options

> Local and International Securities
> Corporate and Government Bonds
> The CFAL Family of Mutual Funds
> Public & Private Deals