QUOVADIS

INVESTMENT MANAGEMENT

WHERE IS YOUR PORTFOLIO GOING?

Call Toll Free 1.855.366.7846

NEW TO INVESTING?

QVO VADIS Investment Management (QVIM) understands the importance of explaining things in easy to understand terms.

Residents of Ontario and Quebec can call us Toll Free at:

1.855.366.7846

Greater Toronto Area:

416.366.7846

Let us take the stress out of investing as we will handle all of your day-to-day investment decisions for you

Our Client Service Managers will walk you through the new client process in 4 easy steps, most of which can be done over the telephone.

1 - NEW ACCOUNT FORMS

A Client Service Manager assists the new client in filling out new account forms

2 - QUESTION AND ANSWER SESSION

Client question & answer session to determine financial needs, objectives and risk tolerances

Answers will be used to build a custom Investment Policy Statement (IPS). This document sets out all investment guidelines to be followed by QVIM

3 - INVESTMENT MANAGEMENT AGREEMENT (IMA)

This outlines all fees and gives QVIM authorization to buy and sell securities on behalf of the client according to the guidelines set out in the IPS

4 - IDENTITY VERIFICATION & SIGNATURE

A government of Canada photo ID (passport OR driver's license)

Client reviews and signs the IPS and the IMA