6 reasons to employ Doyenne as Portfolio Manager for your clients

1. First and foremost, we will wok as a team with you for your client's benefit

2. 30+ years experience, including 4 market crashes. Our research-focused approach guides our Income+, Balanced and Growth models

3. We recognize that clients and advisors are value conscious, so are we! We will do everything we can to make sure we are providing you with the best value

4. Geographically and sector agnostic, We anticipate yield curve changes and money flows to identify trading opportunities. Our most favourite investments are in companies that are doing good things and treat their employees well. That's good business.

5. Competitive management fees charged by assets under management, per trade or based on profit.

6. Owning individual bonds gives you a yield to maturity as a worst case scenario. We have been excelling at this for decades.

pm@doyenne.ca
647.873.8513
doyenne.ca/doyenne-financial-ltd

What having Doyenne as your teams' Portfolio Manager looks like

1. We meet to review your needs, cash requirements and constraints.
2. We offer two choices of custodian: Interactive Brokers for cash, TFSA and RSP clients and Raymond James for LIRA, RESPs, PPPs, cash, RSP, TFSA
3. Flat fee or percentage fee referral choices
4. Quarterly reporting with commentary that is informative but the client can understand.
5. We provide additional market colour and commentary as requested and will attend client events/meetings as needed
6. We work together as a team with the Advisor and we invest the portfolio based on the clients' financial plan

pm@doyenne.ca
647.873.8513
doyenne.ca/doyenne-financial-ltd