

# THE CARTER GROUP AT SCOTIAMcLEOD



## The Carter Group at ScotiaMcLeod. Trust and Expertise.

### What we do.

The CarterGroup at ScotiaMcLeod provides wealth management expertise to private investors, entrepreneurs and charitable organizations. We spend most of our time getting to know our clients better, researching investment ideas and managing our clients' investment portfolios.

### Who we work with.

Our clients include small business owners, retired income-oriented investors and seniors looking to maximize the value of their nest-egg, semi-affluent families with more complex tax and estate planning considerations and a number of individuals and families whose busy lifestyles have led them to realize they need help in managing their financial affairs.

### How we work with you.

We are a team that's committed to personal and prompt service, careful planning and rigorous implementation and review. Our clients tell us they have financial peace of mind for a number of reasons.

- We spend a lot of time getting to know our clients before we provide our written recommendations and ultimately invest into the markets.
- Our "fee for service" approach to business aligns our financial interests with those of our clients and is simple to understand.
- We are available to discuss any changes in your investments or your circumstances and share our regular portfolio review findings at least every quarter. Our service process, approach to investing, and one-on-one communication all help to foster a strong connection between the investor and the "behind the scenes" work that goes into managing their portfolio.



### Our 7 Steps To Long-Term Success

- Get organized
- Have a plan you can understand
- Remain accountable and measure results
- Cut your costs and raise your returns
- Be connected
- Embrace change
- Never Stop Learning

### Our Team

- Chris Carter  
*Associate Director and Portfolio Manager*
- Martin White  
*Investment Associate*
- Robin Smith  
*Administrative Associate*

### Our Contact Information

Suite 200 – 1343 Lonsdale Avenue  
North Vancouver, BC  
V7M 2H7  
Tel: 604-981-7613  
Toll Free: 1-877-220-1199  
Email: [info@askchrcarter.com](mailto:info@askchrcarter.com)  
Fax: 604-981-7611