Jordan Rederburg
Investment Specialist

Credential Asset Management Inc.
T 306 842-9553
jordan.rederburg@weyburncu.ca

“Life can be busy and complicated. My goal is to make your finances easier to understand, and to help you create a plan that will meet you and your family’s long term objectives, so that you can focus on the other things in life that matter. My knowledge base enables me to advise you on a number of areas such as budgeting, retirement planning, and basic investment tax management, to assist you with this. With a variety of investment product options, I can provide you with a simple, low cost investment solution that will help you stay on target with your plan.”

The Value of *Advice*

Helping you create the life *You Want.*

“A dream written down with a date becomes a Goal.

A goal broken down into steps becomes a plan.

A plan backed by action makes *your dreams come true.*”

- Greg S Reid

Weyburn Credit Union

Weyburn Credit Union

T 306 842 6641 \ weyburncu.ca

Your Road Map to Success

We have refined our process to embrace a more integrated client-centered approach. This ensures you receive ongoing value at a reasonable fee.

Preliminary Meeting

This establishes the framework for the financial plan and allows us to explain what we need from you and what you can expect from us!

Identify Goals

This is where we learn what is important to you and your family. Whether you plan to retire early, buy that dream cabin, or both – we want you to share your vision with us!

Collect and Analyze

We know, we know, this is boring finance stuff! We might ask a lot of questions but this helps us to create a strategy – your strategy.

Develop Financial Strategy

We understand life is all about balance. Your financial strategy is a unique road-map developed to enable you to meet your short and long-term goals, while still allowing you to enjoy your current lifestyle. Sometimes sacrifices are required but your financial strategy provides clear direction to guide you.

Implement the Plan

An action plan will be developed which clearly outlines the steps you need to take making it easy for you to implement your plan.

Review and Adjust

The only constant in life is change, but this doesn't mean you need to start over. Your plan is reviewed regularly and adjustments are made to ensure it evolves with you and your family.

Advised Investors Accumulate More Assets

Versus those with no advice, those with 4-6 years of financial advice accumulate:

1.58X more assets

Versus those with no advice, those with 7-14 years of financial advice accumulate:

1.99X more assets

Versus those with no advice, those with 15+ years of financial advice accumulate:

2.73X more assets

Advice is strongly associated with the accumulation of wealth

Anyone can purchase an investment. But studies show that investors who recruit the help and support of a financial professional accumulate significantly more wealth, are better protected, and are far more prepared for retirement and unexpected events than those who do not.

A skilled financial professional delivers a unique perspective based on expertise and experience. They can also help to identify opportunities you may have otherwise missed. Our advisors can guide you through life's major events and relieve the burden of managing your finances. We want to inspire people to take better care of their money.

> We inspire and empower our members by helping them make great financial decisions that enrich their lives.

What Value Do You Receive?

We offer an extensive range of services to help you feel confident about your financial future. As fees are often associated with investing, we want to provide you with an outline of the value received in our process.

Wealth Services

- Ongoing personal advice
- Buy/sell/hold recommendations
- Automatic contributions and withdrawals
- Electronic funds transfers
- Advice on tax slips
- Business succession planning consultation
- Non-commission investment specialists
- Access to a wide range of investment solutions
- Will & Estate Planning consultation
- Tailored solutions to meet your needs

Report & Review

- In-house experts to process and audit transactions
- Regular portfolio/plan monitoring
- Trading activity statements
- Quarterly or semi-annual performance reporting
- Regular portfolio reviews

CredentialOnline.com

- Secure 24/7 account access and a consolidated view of all your investments
- Electronic statements archived for seven years when you sign up for eServices