

# Mutual Success

Your Fund of Information



July 2009

## Investment Team Update

One of the great aspects of being part of the Investaflex Team is the familial relationship we enjoy, both amongst the staff and with many of our clients. Part of being family is celebrating milestones such as the 50th wedding anniversary of Bill and Valerie Fisher (which make my 27 years seem quite modest). Congratulations Bill and Val. What a great example!



many subjects.

lady who has nearly completed her Certified Financial Planner designation, repeatedly coming top of her class in

support of our client marketing and communication. Lois will be your initial point of contact and since the way we operate is different from other firms we ask for your patience and cooperation as she gets up to full speed, and also as we may introduce new ways to enhance our service. Our goal is to continually try to serve you better. Please introduce yourselves to Lois and welcome her to the team.

We also share the loss of family, and in particular I'm sure you will all join me in extending condolences to our Viola Lam and her family on the recent passing of her father. It is at times like this we need our family and friends most.

Attributes like this do not go unnoticed in our industry, and Viola has recently accepted a position with a major insurance company opening the door to new challenges and career opportunities. Our sense of loss is tempered by knowing that we will still be working together, but in a different form. We hope you will join us in wishing Viola the greatest of success in this new opportunity.

We are continuing to work hard through the summer at bringing our research and processes together so that we may deliver the next enhancement to our investment management process. We have faced some challenges as the changes introduced by the implementation of the Mutual Funds Dealers Association (MFDA) Policy MR-0069 which governs investment suitability and risk matching has triggered two sets of changes in Know Your Client (KYC) forms. Each has a different interpretation and this has resulted in significant confusion for our compliance process. We apologize to those clients who have received reams of forms to sign, and then a couple of months later

Viola is a special part of Investaflex, having taken over from our old friend Rachel Nicholson (now happily married in Calgary). She has been first and most frequent point of contact for most of you, and in her three years with us, Viola has progressed incredibly showing patience, attention to detail and a creative flair that has always helped us look good. Behind that constantly cheerful disposition and care for clients is an able and intelligent young

Taking over the role of Office Manager from Viola is Lois Rosser. Lois has a diverse background and set of talents including five years of experience as administrator with another financial planning firm. Her interests include creative and technical writing, and she has a desire to use her creative skills in

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substantially the same forms appear again, with differences that may have been confusing. The back of this issue is now broken and we will be updating all forms for all clients during the next two months. Your patience in this process will be appreciated, and remember as always we are but a call away if you need any clarification.

As with all change, there is a purpose (although sometimes we have to look really hard!), and this is a more general discussion of RISK. Our clients will know this is not a new discussion for us, and we believe that this rationalization and industry standardization affirms our PRISM risk management process. We will be following up on plan updates and investment recommendations during the summer months, so keep your eyes peeled.

August 1 is the beginning of our 15<sup>th</sup> year as Investaflex operating from #308 - 938 Howe Street. This would not happen but for the trust of clients, the hard work and teamwork of our staff and our commitment to putting the client and family first. We thank you for your support and we look forward to the next 15 years!

Best Regards,



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