Travis Strain, CFP
Financial Planner

#200 - 8661 201 Street, Langley, BC V2Y 0G9

Cell (604) 308-6030
Fax (604) 648-9976

Mail@TravisStrain.ca
www.TravisStrain.ca

Travis Strain, CFP has been an advisor since 2006. His earlier career in hospitality management, his Bachelor of Commerce through the University of Victoria as well as his Certified Financial Planning Designation (CFP) created an ideal foundation for his work as a financial planner with his practiced based out of Langley, BC.

Fantastic customer service, accuracy under pressure and conservative behaviour in complex situations are hallmarks of his current popularity with clients in his practice. He is capably supported by a team of specialists in many areas whose teamwork and follow-through are setting new standards of service excellence in building lifetime relationships with an expanding client base.

Travis is passionate about listening to problems before prescribing solutions and then repositioning his client's family balance sheets in order to speed up the wealth creation process – whilst taking care of major risks along the journey. His focus is on high-wealth families, small business owners and busy professionals. Future plans which currently excite his office include using technology and many different media more robustly to deliver superior client service and customizing communication to ensure maximum satisfaction of each client and ensuring their needs are met in the years ahead.

Travis enjoys staying active through playing soccer for a local men's team in Langley, BC as well as lending a helping hand on the family farm. On top of that he is active in the community, sitting on the board of the Rotary Club of Langley Central, serving as the president of Langley Canada Day Celebrations Society from 2011 to 2013, sitting on the Board of Directors of the Langley International Festival from 2008 until 2011, volunteering his time at other events such as the BC Summer Games and Surrey Off-Road Cycling Enthusiasts (2013-2014).

What we do is to maximize our client`s assets gearing across various financial instruments…

So that you can achieve greater leverage on your wealth creation…

Which means that you can achieve your financial dreams on time, whilst eliminating unforeseen risk along the way.

Travis Strain, CFP, BCom

email: Mail@TravisStrain.ca
cell: (604) 308-6030
Office: #200 – 8661 201 Street, Langley, BC V2Y 0G9
Web: www.TravisStrain.ca

Mutual Funds and some Segregated Funds provided by the Fund Companies are offered through Worldsource Financial Management Inc. Other Products and Services are offered through Travis Strain

Travis Strain, CFP
Financial Planner
#200 - 8661 201 Street, Langley, BC V2Y 0G9

Cell (604) 308-6030
Fax (604) 648-9976

Mail@TravisStrain.ca
www.TravisStrain.ca

WHAT'S THE DIFFERENCE?

Banks, Accountants, Brokers… What Sets Travis Apart from the Rest?

As an introduction, I thought I would answer the question that many people think but never ask. That is what makes me different from the other guys?

Let's look at the banks first. As such large institutions we trust them for our loans and bank accounts and daily activities, but do they really know you or the inner workings of your financial picture? Dare I ask…how many different contacts have you dealt with directly at your bank? As a Consultant with Investors Group, I take the time to get to know you and your family and get clear and complete picture of your current situation, as well as your goals. This allows us to work towards your goals and achieve them… using your personal situation as a starting point. The banks simply cannot do this due to their sheer size and the volume of business that they do. You will be a client of ours and I will know you, and perhaps even your dog, by name.

What about Accountants… "don't they do all the tax planning?" One thing I know for sure if that we cannot survive without accountants. They know all the ways to reduce taxes last year and every write-off we can claim to pay the least amount possible for this year. As a Consultant I look forward to the coming years and put strategies in place that will reduce your taxes in the years to come… even in retirement and for your estate. I work with accountants on a regular basis to ensure that you are keeping the most amount of money in your pocket, both now and in the future.

What about other financial planners, Consultants or brokers? Firstly, I have extensive experience in Socially Responsible Investing. This means that together we remove the socially hazardous investments (such as harmful human rights, alcohol, and critical weapons systems) from your portfolios. Secondly, I ensure that when clients need a professional in another industry that they are served by only the best through my personal network of likeminded professionals. This will allow you to have one number to call… that is my cell phone… not a 1-800 number, when you have any questions regarding your finances… I've even been asked whether it's better to lease or buy a car from a client at a dealership!

Do you feel neglected by your bank? Do you feel something is lacking with your current financial planners/advisors that you are working with? Maybe it's time we talked.

If you have any questions please feel free to contact Travis Strain @ (604) 308-6030 or by email Mail@TravisStrain.ca.

Dedicated to achieving your financial freedom!

Travis Strain, CFP
(604) 308-6030
Mail@TravisStrain.ca

Mutual Funds and some Segregated Funds provided by the Fund Companies are offered through Worldsource Financial Management Inc. Other Products and Services are offered through Travis Strain

Travis Strain, CFP
Financial Planner
#200 - 8661 201 Street, Langley, BC V2Y 0G9

Cell (604) 308-6030
Fax (604) 648-9976

Mail@TravisStrain.ca
www.TravisStrain.ca

WHAT MAKES ME DIFFERENT?

My Promise

Together we will build a Socially Responsible strategy that fits your personal needs and values.

I'm here take the time to fully understand you, your goals and give you the strategies to reach them!

Specialize in Socially Responsible Financial Strategies
- Building portfolios built on Social Responsibility
- Strive to help my clients to invest for both performance and social responsibility
- Achieved the Climate Smart Seal in 2010 for Green House Gas Reductions

Positioned as Your Trusted Advisor
- Strategically placed throughout the community
- Have a personal network of likeminded professionals
- Can be asked for direction on many different kinds of financial decisions

Follow-Up
- Always keeping in touch with my clients
- Keeping clients up-to date the latest market developments

Specialized Behaviour Modifier
- Helping clients to not be "their worst enemy"

Solution Driven, NOT Product Driven

Mutual Funds and some Segregated Funds provided by the Fund Companies are offered through Worldsource Financial Management Inc. Other Products and Services are offered through Travis Strain

Travis Strain, CFP
Financial Planner

#200 - 8661 201 Street, Langley, BC V2Y 0G9

Cell (604) 308-6030
Fax (604) 648-9976

Mail@TravisStrain.ca
www.TravisStrain.ca

FINANCIAL PLANNING PROCESS

A. INFORMATION GATHERING
1) Current Situation
2) Concerns
3) Goals – What? When? How Much?
4) Risk Profile

B. INFORMATION ANALYSIS
1) Organize the information in an "easy to understand fashion"
2) Analyze present situation and goals
3) If additional information is required, I will call to clarify

C. DEVELOP A PLAN
1) Make the necessary assumptions and establish percentages for the plan
2) Consider tax implications
3) Consider the time horizon and comfort zone
4) Consider cash flow: present and future
5) Consider all assets and sources of income
6) Consider specific strategies applicable to the plan
7) Put together your proposal including a summary sheet stating the advantages of the proposal

D. REVIEW THE PLAN WITH CLIENT
1) Assess any changes to information or goals
2) Review proposal slowly and in "easy to understand" terms
3) Receive feedback and make alterations to "The Plan"

E. IMPLEMENT THE PLAN

F. MONITOR THE PLAN AT LEAST EVERY 6 MONTHS

G. SUGGEST CHANGES AND ADJUSTMENTS WHEN REQUIRED

H. MAINTAIN CONSTANT COMMUNICATION WITH CLIENTS

I. INFORM CLIENTS OF MAJOR ECONOMIC, TAX AND INVESTING CHANGES

Mutual Funds and some Segregated Funds provided by the Fund Companies are offered through Worldsource Financial Management Inc. Other Products and Services are offered through Travis Strain

Travis Strain, CFP
Financial Planner
#200 - 8661 201 Street, Langley, BC V2Y 0G9

Cell (604) 308-6030
Fax (604) 648-9976

Mail@TravisStrain.ca
www.TravisStrain.ca

WHAT MY CLIENTS CAN EXPECT

- My relationship with my clients starts with developing a **personalized comprehensive financial plan** to get my clients from where they are today to achieving their long-term financial goals.

- I **coordinate** the activities of existing professional advisors such as tax accountants and estate lawyers. In addition I work with a **team of tax, investment, insurance, and mortgage specialists**, to take advantage of their in-depth specialized knowledge as it applies to my client's requirements.

- I make every possible effort to ensure that your financial plan changes with changes in your life. This is done through **regular meetings** and constant contact with every client either in their homes or in my office.

- Operating within each client's risk profile, I construct an investment portfolio that will achieve **long-term growth** without undue risk. I focus on lifetime wealth creation and preservation, for you and your estate.

- I practice **full disclosure** with my clients. There are no surprises.

WHAT I EXPECT OF MY CLIENTS

- In order to provide my clients with the best possible financial plan I need their support in providing me with **all necessary documentation** that I may request.

- My **time is valuable** as is my client's time, as such I pledge to **arrive within 10 minutes** of our scheduled appointment time and I expect the same commitment from my clients.

- I make a commitment to **return all calls within 24 to 48 hours** and I expect my clients to extend the same courtesy in returning my calls.

- Provided I meet all of my client's expectations, I expect them to **introduce me** to those people they care about so that I may provide them with the same service.

- Life can be unpredictable at times and as such I expect my clients to let me know of **any significant changes** that may occur in their lives so that we can adjust their financial plan in a timely manner.

- The best financial plan in the world is useless unless it is implemented. If my clients love the work that I have done for them I expect them to **implement the plan** so we can begin our professional journey together.

- And most important of all: you **laugh at my jokes**!

Mutual Funds and some Segregated Funds provided by the Fund Companies are offered through Worldsource Financial Management Inc. Other Products and Services are offered through Travis Strain

Travis Strain, CFP
Financial Planner

#200 - 8661 201 Street, Langley, BC V2Y 0G9

Cell (604) 308-6030
Fax (604) 648-9976

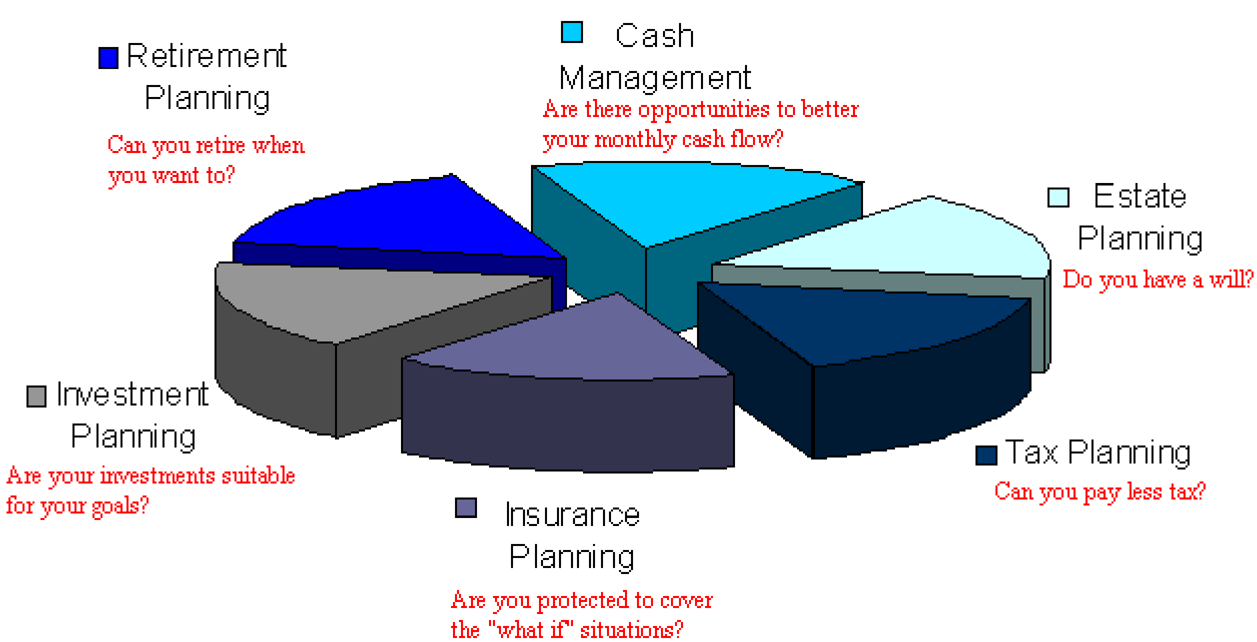
Mail@TravisStrain.ca
www.TravisStrain.ca

WHO DO I DO IT FOR?

Life Stages and Financial Planning Needs

Starting Out 20-40yrs	Prime Time 40-60yrs	Retire Ready 60+ yrs
- Wealth Accumulation - Emergency Planning - Children's Education - Mortgage Reduction - RRSP Strategies	- Wealth Maximization - Tax Reduction Strategies - Asset Allocation - Investment Planning - Retirement Planning - RRSP Strategies	- Wealth Preservation - Funding Major Purchases - Health Care Costs - Estate Planning - Income Planning - Tax Strategies

6 Pillars of Financial Planning



Mutual Funds and some Segregated Funds provided by the Fund Companies are offered through Worldsource Financial Management Inc. Other Products and Services are offered through Travis Strain

Travis Strain, CFP
Financial Planner
#200 - 8661 201 Street, Langley, BC V2Y 0G9
Cell (604) 308-6030
Fax (604) 648-9976
Mail@TravisStrain.ca
www.TravisStrain.ca

Useful Links:

What Our Clients Are Saying

5 Key Issues In Your Life

E-Book – 10 Thinks Your Financial Advisor (probably) Doesn't Tell You

Sample Financial Plan

Mutual Funds and some Segregated Funds provided by the Fund Companies are offered through Worldsource Financial Management Inc. Other Products and Services are offered through Travis Strain