

Testimonial #1

February 3, 2009

To: The Alan Rae Wealth Management Team

On Jan. 21, 2009, my partner, Tony Verhaaf, and myself met with Kirsten Jenkins and Heather Baker - Suki also sat in for part of the meeting. All three are extremely professional but not unapproachable. The questions that we had, were answered in a way that we understood. As well, we had questions put to us, that we hadn't even considered! Yes, there was a lot covered, and a lot to think about but we are both very glad that we had this meeting.

The other thing that we are very thankful for, is the advice that we have received from Alan, and the other members of his team! I, and other members of my family, have had dealings with Alan for many years. Yes, we are currently going through some tough times but I feel we will come out of it, in pretty good shape, in the long run!

With our thanks to all,

Leslie Light
Tony Verhaaf

Testimonial #2

Hi Alan;

How the heck to you get an individual like Brodie to make a house call on a beautiful Friday afternoon at 4:30 pm?

I have to be honest, we had consulted with a lawyer, had a will in place and thought this would be a quick overview. How wrong we where. Thanks to Brodie we now understand that we missed a great deal in protecting our loved ones, our assets and would have thrown away thousands of dollars needlessly.

Brodie is articulate and obviously an expert in his field. Likely the best hour and a half my wife and I have spent in regards to preparing our will. Alan thanks so much for making this possible.

Rick and Jan Christiaens

Testimonial #3

I knew I was lucky when I received the call saying myself and five friends had won the lottery, but I'm only realizing now that luck struck me twice over. The chief trustee and ticket holder of our lottery group has a daughter and son-in-law that knew Alan Rae, and was able to put us into contact with him right away. We went from the BCLC HQ in Richmond straight to Alan's office, where he gave us the best advice possible. "Do nothing with the money. Forget about it", were his words soon after walking in the door.

Needless to say we were all pretty stunned, but tucking it away and resuming some sort of normalcy only helped for when we eventually sat down and looked at the financial plan the team had envisioned. And it's looking back now that I realize just how lucky I am.

From the expertly prepared Financial Road Map, built specifically for myself, to the extensive network of contacts available, to the obvious experience and commitment of the whole team, I'm very fortunate to have been put into contact with Alan Rae. Whether it's a question about "Investments 101" or if spending a certain amount is a "red flag", nothing is a "wrong" question, and Alan and his team answer everything incredibly quickly and confidently.

Indeed, the customer service alone would have kept me investing with Alan and his team, but I think the core value of their offered service is the commitment to building a portfolio that works with you and how plan on living your life. It's not just numbers and pie charts and returns on investments, it's a stable plan that's only implemented once the team knows you personally and what you plan on doing. The portfolio is almost secondary in the scheme of things, because without knowing what the money is needed for, or the plans and aspirations one may have, then the investment really is just numbers.

Alan and his team provide that plan, and so much more, and I truly look forward to working with Alan and his team in the years to come!