Scotia Wealth Management™

THE NEWTON GROUP
ScotiaMcLeod®, a division of Scotia Capital Inc.

Ten reasons why you should invest with us

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We focus on you

We choose our clients with discretion. To deliver a high quality experience we stay focused on the sophisticated needs of affluent investors and their families. We have gained insights from the vast experiences of our clients' lives and can share real life solutions.

Legacy

We create a Wealth Plan for each client that is about more than just the transfer of money; it encompasses a client's legacy aspirations. We take the time to meet with a immediate family to understand their values, priorities and wishes. This helps us realize each client's vision of their legacy and ensure it lives on through generations.

Performance

Return is measured in the context of "risk-adjusted return." We assess how much risk is assumed for the performance received, because a high rate of return can be achieved with very different risk profiles. We also include performance attribution, which is rarely discussed in the traditional model, to assess how performance is achieved.

360° wealth assessment

Our unique quantitative ranking of your overall wealth management plan highlights strengths, weaknesses and potential opportunities.

Our investment philosophy

We deliver a consistent, repeatable and unemotional approach that complements all asset classes and styles.

Reporting

Our comprehensive reports inform you of rate of return, book value and cost analysis, as well as asset allocation studies and concentration analysis..

Real returns

Not only do we discuss risk-adjusted returns, we also present performance net of fees and after tax.

Our investment approach

In addition to our own core portfolio management services, we also use third-party, independent, discretionary investment counselling firms in areas where we do not possess a particular specialty.

Rules-driven rebalancing

We systematically rebalance to remain consistent with a portfolio's optimal asset allocation and manager mix. In the traditional model, portfolios typically drift considerably and, without a framework for review, are left unchecked and out of balance.

Incentive

We charge an asset-based fee. This revenue stream correlates directly with the direction of the value of your investments. Fee-based compensation is determined by asset size and value-added potential, unlike activity-based commissions which are charged per transaction..