Scotia Wealth Management™

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

Company Profile

The Newton Group
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Our clients

At The Newton Group, your advisor is your portfolio manager and more.

As a client of The Newton Group, you enjoy direct access to your portfolio manager. Our clients, who are professionals, executives, retirees, business owners and small corporations:

- have a minimum of $500,000 to invest
- are too busy to manage their own wealth
- are committed to our wealth management process
- demand accountability
- expect regular communication

Our services

- family wealth management
- tax, retirement and financial planning
- investment policy construction
- strategic asset allocation
- performance and risk management
- access to global research
- portfolio management
- individually managed accounts
- insurance solutions
- access to investment banking
- access to private banking services
- vision and life planning
- coordination of advisory teams
- investment education
- access to professional executors and trustees

Working with us

Our solutions allow you to address your financial needs and goals – both personal and corporate – through minimizing taxes, enhancing investment income, managing risk, caring for your health, and creating a legacy.

What you can expect when working with our team:

- a complete analysis of your financial objectives and an audit of your current insurance coverage
- professionals with a thorough understanding of available products and access to the most technically advanced expertise within the insurance industry
- strategic, insurance-based solutions to meet short-term and long-term goals and a full understanding of how these solutions can enhance your overall financial plans
- illustrations, explanations, competitive analysis, and full support during the application and underwriting process
- expertise on planning solutions for tax, business succession, estate, insurance and philanthropic planning
- ability to assist in living benefit products such as Critical Illness, Disability Illness and Long-Term Care