est. 2017

LANE CUTHBERT
FINANCIAL

LCF INVESTMENT CONSULTING PROCESSES

Before any planning can be done, it's an important step in the process to determine if the services we offer are the right fit for your objectives so for all new clients Lane (our owner) will set up a 15-min call to introduce himself and get more details about your financial goals. This will provide clarity to determine your objectives but more importantly, this will help determine if you feel confident in our services and want to work with us.

If you complete a Personalized Scoreboard plan and it is determined that you are able to invest and want Lane and LCF to manage those funds, Lane will present to you his investment suggestions via portfolio management. As a complementary service included in Lane managing those funds the consultation fees are waived as well as a complimentary 30 minute meeting to review your portfolio twice a year. Investor focused emails are sent out periodically throughout the year to keep clients informed on current market conditions. At the beginning of the year and approximately half way through the year, clients are encouraged to book their complimentary portfolio reviews.

If you currently manage your own investment portfolio or would like to move forward with managing your own investment portfolio (ie: TD direct investing, Wealthsimple, Interactive Brokers etc), Lane is a licensed professional stock, options, and futures trader with a wealth of professional investment and trading knowledge and offers professional investment consulting to help you maximize your portfolio.

INVESTMENT CONSULTING FEES

- 30 min / $100 (GST Not Included)
- 1 hr (60 MIn) / $150 (GST Not Included)

We do ask that if you book a consulting meeting and are unable to attend that you give LCF 24 hrs Notice. Currently, due to Covid-19, all consulting meetings are happening via phone calls or Google Meet.

Invoices will be sent prior to meeting and needs to be pre-paid to confirm your booking. We offer many payment options to our clients and are to book multiple sessions if you'd like

FAQ'S

1. If Lane already manages my portfolio, will I have to pay for meetings or reviews?

    If you are an existing client, we are so grateful for your business and in an effort to keep you well informed about your investments and financial future we offer 2 complimentary 30 minute sessions per year to discuss market outlooks and market performance inside your portfolio.

2. If I have money that I want invested directly in the stock market can Lane manage that money and make stock, options, and futures picks on my behalf?

This is currently not a service that we are able to offer, however, Lane is currently in the process of completing the required certifications and designations to be able to offer this service to those clients interested in that style of investing.

3. Will Lane offer specific stock picks?

    At this point, no. However Lane is working on developing a membership program where he will be able to offer stock picks, market overviews/updates, and offer real time trading support for self directed investors.

4. What do I receive with investment consulting services?

    You will receive a detailed outlook on the current market conditions along with specific personalized recommendations and comments about your personal portfolio, including a management review and whenever possible, tangible next steps to either protect risk exposure and or maximize your portfolio returns.

Any other questions? Email our team at LCF and we'll get back to you.