

# Murray Wealth Management Group

## 6 Reasons to book an appointment to see me

### 1. Comprehensive Planning: I listen, build a plan, monitor and adjust the plan

I utilize sophisticated financial planning and investment management to allow my clients to build and maintain their wealth. With the help of a team experts we cover financial planning, insurance planning and estate planning. My goal is that a call to me is the last call you'll ever have to make for growing and protecting your wealth.

### 2. Investment Process

I build each portfolio uniquely. I do not "slot" my clients into a model such as "medium risk" or "70/30". My process starts with listening and gathering facts. I then utilize the best managers and investments in the world to meet your goals and monitor those investments carefully.

### 3. Investment Management beyond traditional stocks and bonds.

In today's markets it takes more than just stocks and bonds to be truly diversified. I regularly add diversification to client's portfolio's with investments that have a low correlation with the overall market. Investments like real estate, infrastructure, income paying annuities, and hedge funds.

### 4. It's not how much you make its how much you keep

I invest money in the most tax efficient manner possible. I have access to investments that pay out income in a much more tax efficient manner. I have access to flow through partnerships that can reduce income tax from a large capital gain.

### 5. Experience & Client Satisfaction

I love what I do and there is nothing I would rather do and I think that shows every day. I started in this business 20 years ago at age 21. I have been doing it for nearly 1/2 of my life.

My business has a very high client retention rate because I do whatever is necessary to ensure my clients receive the best service and reach their goals. I believe that an advisor must be integrated and emotionally invested with clients and their families to effectively guide them. In a recent survey, 100% of my clients reported being Happy or Extremely happy with the overall service and advice that I give them.

### 6. Legacy & Charitable Giving

Giving to others is a gift in itself and many people want their gifts to last after they have gone. I have access to programs that allow your family to set up their own charitable foundation with as little as \$25,000 for a very low cost

#### Brendan Murray

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