

Welcome!

Thank you for connecting with us! A little about us below and at <https://dofinancial.ca/about-us/>.

- **Access:** We have access to virtually every insurance and investment provider in Canada. This means no other advisor or firm has access to any product or service with more choices or lower price. Therefore, there is no need to shop around. We do that for you. If you are shopping around for price, or returns, we may not be the right fit for you.
- **Value** (price, quality, service): Price is only a consideration in the absence of value. Its highly unlikely any other advisor or firm, will surpass us on value, wisdom, or access to traditional and non-traditional insurance, savings, investments, strategies, or concepts, considering our 40 years of experience, knowledge, and testimonials
<https://dofinancial.ca/testimonials/>.
- **Cost:** There is no out of pocket cost to you for a consult. When you implement a solution, our compensation is listed in our engagement agreement.

Pre-Engagement Agreement

Considering DO FINANCIAL will be allocating their time, and their money, to assist me, at no financial outlay to me, I agree to implement solution(s), when determined, with DO FINANCIAL and no one else in a timely manner.

Printed Name

X _____ or eSignature ☐
Signature

Printed Name

X _____ or eSignature ☐
Signature

Date