

A lighthouse on a hill at night with its light glowing. The lighthouse is a tall, cylindrical stone tower with a white lantern room at the top. It is situated on a hillside covered in dark, scrubby vegetation. The sky is dark blue with some light clouds. The overall scene is illuminated by the lighthouse's light, creating a dramatic and atmospheric effect.

Take your financial advisory practice to the next level.

A classy heritage brick and beam building with high ceilings near the world famous St. Lawrence market. Inexpensive client parking is nearby and we are steps from Union Station.

A sophisticated office with advanced tools for the established advisor seeking to be a leader in Canadian wealth management.

A training and coaching mentorship for advisors transitioning to IIROC from MFDA or insurance.

A developmental office for aspiring advisors needing a helping hand.

Our Advantages:

- The freedom to offer products from a wide range of institutions – objectivity and independence essential to becoming a trusted advisor.
- You own your book of business – and this will never change.
- No contracts to sign. You are your own business professional. Period.
- No limits on where you can attract and work with clients.
- No sales quotas.
- Flexible, high payouts on revenue.
- A financial planning culture.
- A succession program to take care of your family.
- Referrals of new clients to help you grow.
- A strong national brand – learn more at www.manulifesecurities.ca
- A local office owner that will help you grow – learn more at www.kurtismycfo.com.



You are a successful, established advisor seeking to focus more on affluent client management growth while owning your business entirely and maximizing profit.

- A classy heritage brick and beam building with high ceilings near the world famous St. Lawrence market. Inexpensive client parking is nearby and we are steps from Union Station.
- Peer group monthly strategy session to share best practices among advisors.
- Industry competitive due diligence to better compete for business.
- State of the art stock and bond wrap programs and fee based accounts – wide fee flexibility.
- Third party stock research tools and a leading trade desk.
- Capital market group providing new issues, private company advisory services and advanced support on all investment matters.
- High advisor grid payouts.

You are a successful MFDA or insurance licensed financial advisor seeking to convert to the IIROC platform to offer a broader array of investment products in the new stock and ETF world.

- Attend our popular national “IIROC School” offering a week of training on all topics (compliance, products, marketing, planning and more) essential to becoming an IIROC financial advisor).
- Training and coaching on:
 - How to use research and select stocks, bonds and ETFs.
 - Portfolio construction using individual securities; converting from mutual funds and how to transition.
 - Positioning your new IIROC practice with existing clients.
 - How to market to new clients interested in stocks and bonds.
 - Training on trading techniques to minimize errors and maximize productivity.
 - Proper compliance techniques in your IIROC practice.
 - Exploring fee based accounts – who it is right for, how to convert clients, compensation adjustments and leading selling techniques for fee based.
 - Winning strategies for attracting new clients in your practice.

You are a new or emerging financial advisor seeking to learn the basics of building a successful practice, providing proper planning services, learning how to attract new clients and earning a growing compensation base.

- Seasoned guidance, mentorship and ongoing coaching on:
 - How to prepare a financial plan and how to construct a portfolio.
 - Servicing standards for clients.
 - How and when to hire staff.
 - Attracting and winning new clients.
 - Tools, charts, checklists and letter templates for practice efficiency.
 - Dress for success and first impressions.
 - Flexible financial arrangements until you are on your feet!



Work alongside one of Canada's most established and successful financial advisors:

About Kurt Rosentreter
CA, CFP, CLU, TEP, FMA, CIMA, FCSI, CIM
Senior Financial Advisor, Manulife Securities Incorporated

- Past co-founder of the billion dollar investment advisory practice at one of Canada's Big Four accounting firms
- Instructor, Wealth Management, Ontario, BC and Manitoba Institutes of Chartered Accountants
- National best selling author, with seven books on wealth management
- Regular and past contributor on money strategies to The Globe and Mail, The National Post, The Toronto Star, CBC TV, Canada AM, Canadian Business magazine, Maclean's and other media.
- Past national board member for The Canadian Association of Financial Planners, The Financial Planner Standards Council, Advocis and the Manulife Securities advisory council.

For a confidential discussion about moving your practice to our office at Suite 302, 3 Church Street, Toronto, contact us at:



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