

**CLIENT ANNOUNCEMENT – CO-BRANDING ADAM CAPITAL - MANULIFE SECURITIES AND LAUNCH OF NEW WEBSITE [WWW.ADAMCAPITAL.CA](http://WWW.ADAMCAPITAL.CA)**

Earlier this year, we replaced our Berkshire lion logo with **Adam Capital** and Manulife Securities logos. This co-branding strategy is a way to name and identify the separate entities who work together to help clients achieve their goals and objectives.

After careful consideration we decided to co-brand to better segregate the two entities that you deal with and to provide a consistent, long-term identity that clients can relate to. Had we implemented this concept when we were Berkshire, the purchase by Manulife Securities would have been virtually seamless in that our clients would still have been able to identify with **Adam Capital**. Co-branding offers stability, comfort and continuity during times of change at head office levels.

The two other Ottawa branches co-branded sometime ago. They are Gentry Capital-Manulife Securities on City Park Drive and ValCore Planning-Manulife Securities on Somerset Street.

Each entity is responsible for various roles and responsibilities. **Manulife Securities Incorporated** is the registered securities dealer and is responsible for administration and “back office” functions such as:

- Providing a regulated trading platform that allows us to effectively and efficiently transact securities on your behalf
- Preparing and mailing client investment statements & confirmations of purchases and sells
- Processing payments (your deposits) for securities purchases and account administration
- Manulife Securities Incorporated is a member of CIPF (Canadian Investor Protection Fund) and subject to various provincial and federal regulatory over-sight

**Adam Capital** is the registered trade name for our Manulife Securities branch in Ottawa West. We are the “front office” that enables me to provide services such as:

- Providing comprehensive financial planning which includes written financial plans
- Providing full retirement advice including estate and tax planning strategies
- Providing individualized investment advice based on your financial goals, life stage, risk tolerance and timelines
- Providing advice on investment loans, mortgages, risk management such as life, disability, critical illness, long-term care, etc.
- Tax preparation

I encourage you to browse the new website and if you have any comments or suggestions, by all means please send me an email. We trust that the launch of this new communication tool will be of benefit to you and we thank you for your patience during the completion of this project. The **Adam Capital** website is meant to be an extension of our business practice and we believe this will enhance and foster the added value of our personal service that you have come to know and expect.

As always, we welcome your feedback regarding this initiative.

Yours very truly,

Duane

*"Create Wealth, Achieve Freedom"*

**Duane Francis, CSA, CIM, FCSI, Ch.P. Strategic Wealth  
Certified Financial Planner  
Investment Advisor**

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