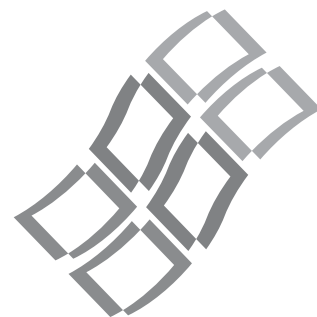


If your advisor is unfamiliar with your financial situation, objectives and financial needs, he or she will not be able to serve you in the best possible way. Knowing one's client is an ethical rule. It is not an option—it is an obligation. Clearly, if you are not asked questions, you cannot provide answers. Your advisor wants to get to know you better in order to serve you according to the requirements of the profession. So by answering all of the questions asked, you will receive advice that is much more adapted to your needs.

If your personal finance expert doesn't ask you any questions, ask yourself a few!

When advisors define an investor's profile or analyze an individual's financial needs, they are doing their job as it should be done. At the Chambre de la sécurité financière, our members have only one option: competence. Knowing one's client is mandatory. So you might want to ask yourself a few questions if your advisor doesn't. Because competence is your best protection.

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