

ScotiaMcLeod *Heritage* is a prestigious offering with a complimentary range of select services that places your financial needs front and centre. *Heritage* is your invitation to a specialized level of client service. This service is our way to not only say thank you to our premium clients, but also to add value to your relationship with us.

BUILDING RELATIONSHIPS FOR LIFE

Since 1921, ScotiaMcLeod has helped generations of Canadians reach their financial goals by placing their needs first and providing trusted advice. Our tradition and reputation for building lifetime relationships will continue as we offer an enhanced level of exclusive service for our clients.

PROGRAM HIGHLIGHTS

Client Service Highlights

- Heritage Premium Binder
- Online Access to investment account and research
- Waived Fees for a variety of services
- Magazine subscription
- Exclusive Event Invitations

Investing & Planning Highlights

- Comprehensive Financial Planning
- Expert Will & Estate Consultation
- Insurance Consultation
- Preferred rates to Private Banking
- Invitation to exclusive Investment Calls and Events Investment Publications

We will continue to look for more ways to recognize how important your relationship is to us and to say thank you for your ongoing commitment to ScotiaMcLeod.