PARKYN - DOYON LA ROCHELLE | PWL CAPITAL

Chart Your Financial Future with Peace of Mind

Comprehensive Wealth Management Advisors

www.parkyndoyonlarochelle.pwlcapital.com

Trusted financial advisors for highly successful Canadians

We all want to live a comfortable life. We want to protect our families and our assets, and leave a legacy to our children. But our specific goals are all different. So are our definitions of success.

That's why the Parkyn – Doyon La Rochelle team takes a personalized approach to managing your wealth. Our comprehensive wealth management services allow you to optimize all aspects of your financial life, while respecting your lifestyle and comfort level.

Our Comprehensive Wealth Management Services

INVESTMENT MANAGEMENT

Using a research-driven approach, we determine the best investment strategy for your goals, time horizon, and risk tolerance and capacity. Over time, we adapt your strategy as needed to optimize outcomes. We also provide hands-on coaching to help you make decisions that work toward your goals, not against them.

- Globally-diversified portfolio that's customized and low-fee
- Strategic asset mix to minimize volatility fears and maximize long-term returns
- Behavioural coaching to address biases and habits hindering smart financial decisions

FINANCIAL & TAX PLANNING

We tailor our comprehensive financial and tax planning services to maximize your savings and investments. Working with your accounting, legal, and insurance specialists, we'll assess risk, minimize tax liabilities, and protect your assets. Through financial projections and tailored solutions, we help you plan ahead for life's major milestones.

- Tax planning to optimize your financial position
- Insurance planning to protect loved ones and assets
- Estate planning to preserve your legacy
- Retirement planning to map a secure and sustainable journey
- Education funding strategies for future family commitments
- Support for incorporated individuals to balance personal and business goals

INTER-GENERATIONAL WEALTH TRANSFER & PHILANTHROPIC PLANNING

Preparing your family and your money for the transition of wealth requires careful planning and open discussion. No matter how complex your situation, we can help you clarify your values and goals into a comprehensive estate plan so that you can leave a legacy of family wealth and in addition make a positive social impact. We work with your chosen experts to ensure a smooth transition in accordance with your wishes.

- Comprehensive strategies for establishing trusts, estate planning, or other vehicles
- Help with navigating charitable giving, including setting up a family foundation and integrating philanthropy into your wealth transfer plan

See common pitfalls that can derail your financial plans and how to avoid them in our ebook, **The Seven Deadly Sins of Investing.**

Enjoy financial prosperity & peace of mind

Financial success is more than just portfolio returns – it's about aligning wealth with values and leaving a lasting legacy. Our integrated wealth management services let you define your financial goals based on your lifestyle today and your aspirations for tomorrow.

Our Investment Philosophy

PATIENCE, CONVICTION, RESULTS.

Our proven long-term investing philosophy is built on stability and resilience. We help you see the strength of your investments so that you can sleep easy at night, even amid market ups and downs.

- Evidence-based investment strategies grounded in empirical evidence and Nobel Prize-winning research
- Low-cost, globally diversified investing utilizing ETFs (Exchange Traded Funds) and tax-efficient mutual funds from world-class investment companies
- Holistic approach prioritizing factors within our control – such as tax management and asset allocation

Our Roadmap to Financial Prosperity

Here's how we help you achieve your financial goals with clarity, transparency, and peace of mind. Our proven approach lets you live a good life, today and tomorrow.

1 GOALS & OBJECTIVES

We discuss your priorities to understand what matters to you. We consider both short-term and long-term perspectives.

2 INVESTMENT STRATEGY

We develop a tailored investment strategy and roadmap. We base these on your personal and professional situation and aspirations.

3 ACTION PLAN

We handle all paperwork and facilitate the seamless transfer of your assets. We take care of everything.

4 FINANCIAL PLAN IN MOTION

We set your comprehensive financial plan in motion. We constantly inform you of your progress towards your goals.

5 PEACE OF MIND

We regularly assess our strategies based on your evolving circumstances. We adapt and refine as needed to ensure you stay on track.

Financial advisors who understand your goals, with the experience to get you there

Why Work with Parkyn – Doyon La Rochelle?

- Unlike other firms, we offer comprehensive wealth management services to optimize all aspects of your financial life. This encompasses portfolio management, financial and tax planning, and inter-generational wealth planning.
- We work closely with you to develop your investment strategy, retirement plan, tax plan, charitable giving plan, and estate plan. We also collaborate with your preferred tax, legal and other advisors to ensure all implications are considered. We do the heavy lifting with full transparency, freeing you to focus on life's other priorities with peace of mind.
- We aim for your long-term financial success. We embrace an evidence-based investment philosophy guided by Nobel Prize-winning research and tailor our prosperity strategies to your lifestyle.
- We use a straightforward, independent fee-based model to ensure you always get unbiased advice that's free from bank or brokerage affiliations.
- We coach you on disciplined financial behaviour so that market volatility and impulse decisions don't undermine your confidence or best interests.

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Meet Our Team

Trust is vital when choosing a financial advisor. Work with a team that understands that financial success is more than just portfolio returns – it's about aligning your wealth with your values and leaving a lasting legacy that you and your loved ones can be proud of. It's also about setting financial goals that work for your lifestyle and risk tolerance.

James Parkyn
CIM®, FCSI, F.PI
Co-founder, Team Lead & Portfolio Manager

François Doyon La Rochelle
CFA, BBA
Portfolio Manager

Marina Krupnik
CIM®, B.Comm
Investment Advisor & Senior Wealth Management Analyst

Daniella Masciotra
Financial Planning Associate

Stacey Gould
Client Operations Specialist

Menyar Somai
Executive Assistant & Communications Coordinator

> *"The Parkyn-Doyon La Rochelle team's customer focus, versatility, sound advice, external proven expert network and financial performance are exemplary. After 20 years, we trust the Parkyn Doyon La Rochelle team with our financial affairs and plan to continue our business relationship for the long term."*

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LA ROCHELLE

The Parkyn – Doyon La Rochelle team is based out of the Montreal office of PWL Capital Inc, a privately owned wealth management firm with more than $5 billion in client assets. Our team manages client assets under the expert leadership of James Parkyn and François Doyon La Rochelle, who have been helping highly successful clients in Montreal and across Canada build wealth and lasting legacies for over 25 years.

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