

START WITH MORE...



THE SENTRY GROUP
HOLISTIC PLAN
FOR INDIVIDUALS AND BUSINESS OWNERS



SENTRYGROUP
INDIVIDUAL AND CORPORATE CONSULTING



...END WITH MORE!

www.sentrygroup.ca

THE SENTRY GROUP HOLISTIC PLAN



Introductory Meeting - 15 minutes

This meeting is **your** official introduction to Sentry Group, who we are and what we do. This meeting is **our** opportunity to get to know you, ask pertinent questions and get a feeling of where Sentry Group can add value to the relationship. After this meeting **both parties** will have a thorough understanding of where we can work together and an outline of our future relationship.

Discovery Meeting

The Introductory Meeting is followed by an “Information Gathering” Session. This time is used to collect detailed information needed to begin creating your Holistic Plan. Before this meeting you will have the opportunity to gather the information **YOU** need to feel comfortable with the process and your new relationship with Sentry Group.

Sentry Group Team Meeting

During this part of the process, the Sentry Group team of professionals discuss your unique situation, determine where we can add the most value and formulate suggestions regarding the direction your Holistic Plan should take.

Presentation of Your Holistic Plan

Sentry Group will outline the opportunities available to you and provide a cost benefit analysis for each of the proposed solutions. You will be presented with an implementation plan and timeline. At this point you will have a clear understanding of the direction the Sentry Group team feels would best suit your situation, goals, and objectives.

This meeting will provide you with the opportunity to become completely comfortable with the recommended direction. You will have a clear understanding of the benefits and cash flow requirements associated with the Holistic Plan.

MAINTAINING YOUR PLAN



Your Holistic Plan doesn't end with our presentation. It is Sentry Group's philosophy to be actively involved in our clients financial success. We want to build a lasting relationship so we can help you grow your net worth by 20% annually. The Sentry Group Holistic Plan is designed to grow and adapt, with your business and family situation.

How do we Keep Your Plan Up-To-Date?

All Sentry Group Clients receive:

- ✓ E-mail access to our team of professionals
- ✓ Monthly newsletters and bulletins
- ✓ Investor updates
- ✓ Monthly, quarterly or semi-annual statements
- ✓ Annual client surveys (How are we doing, what do we need to improve upon)
- ✓ Invitations for business to business, family and client appreciation events
- ✓ Access to ongoing financial information and research

In addition, Individuals and Families receive:

- ✓ Semi-Annual reviews
- ✓ Annual "Board of Directors" meeting
- ✓ Plan recommendations to reflect change in circumstances

In addition, Business Owners and Shareholders receive:

- ✓ Quarterly reviews
- ✓ Annual "Board of Directors" meeting
- ✓ Quarterly financial statement analysis
- ✓ Comprehensive cash flow management plan
- ✓ Access to our Tax and Accounting experts

It is our commitment that you receive the best service with regards to ongoing monitoring, discussion and adaptation of your plan.



FEE FOR HOLISTIC PLANNING SERVICES

Discovery and Holistic Plan (One Time Payment)

Business/ Corporate	\$1,500.00
Individual/ Family	\$ 500.00

Financial Planning Maintenance Fee

Business	\$ 250.00*
Individual/ Family	\$ 100.00*

Please note the Plan Maintenance Fee is the monthly fee we charge to maintain your plan. Please refer to the "Maintaining Your Plan" section for further details on what is included in this monthly fee.

*Implementation Offset

Clients will be rewarded for having Sentry Group quarterback the implementation of their plan.

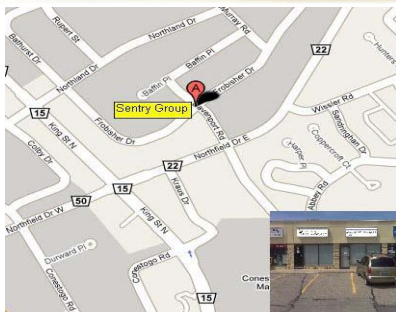
Referral Fee Rebate Plan

Sentry Group firmly believes in helping our clients grow their business through referrals and we hope you feel the same. As such, For every new client you refer to us you will receive:

Business Owner Referral	\$ 500.00
Individual Referral	\$ 200.00

Ask us about our Sentry Group Business to Business Networking!

OUR LOCATION



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