

# Portfolio Review

Steps, fees, and background info

# Good Investing

We are independent investment coaches. We don't sell any products or take any commissions. Instead, we educate and empower our clients to feel confident investing their own money according to their values.

## Mission: To help 1,000,000 Canadians invest intentionally

Our change theory is based on the idea of a tipping point. As more people invest according to their values and earn good financial returns, others will follow suit. Clients feel pride in their portfolio and now have the language to tell others why it's a good idea. Meanwhile, more money flows into companies that are sustainability leaders, helping them grow faster than their competitors and raising their value. As these investments perform better financially, additional investors will be attracted to this approach.

## How it Works

We are not brokers, advisors, or money managers. Instead, we're like coaches and consultants that offer an independent perspective. Our model is based on education and empowerment, with the goal of helping one million Canadians invest intentionally.

Some clients are mostly comfortable managing their own portfolio, but need a little bit of help or a second set of eyes in order to feel confident with their investment plan. Consider it like an à la carte menu where you can pick and choose which topics are helpful. Some things we can help with are:

- Review your existing portfolio
- Measuring the carbon footprint
- Identifying any ethical red flags
- Suggesting lower cost options
- Getting the right asset mix
- Tax optimization
- Currency conversion using Norbert's Gambit
- Automating the rebalancing process



# Good Investing

## Fee Structure

We charge a flat rate on a sliding scale based on how much you're investing. A typical portfolio review takes 2-3 hours.

Hourly Price: \$300-\$750 + sales tax

Sliding Scale: 0.3% of your investments

*\*We proudly offer a 15% discount to anyone who works or volunteers for a non-profit or social enterprise\**



## Resources

[Preparing your portfolio for a changing climate](#)

[CBC The National - Dec 4 2018](#)

[Moolala Radio Show - Sustainable Investing: Good for your feelings, but what about your finances? \(9 mins from 10:45-20:15\)](#)

[Canadian Couch Potato Podcast: Couch Potato With a Conscience](#)

[Rational Reminder Podcast - Sustainable Investing: A Philosophical and Environmental Perspective on Your Money, with Tim Nash](#)

