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Project: Newport Private Wealth – New Website**

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| **Client: Newport Private Wealth** | **Created By: Elan** | |
| **Project: New Website 2024** | **Docket: NWPT-006 OCT23** | |
| **Requested By: Elizabeth** | **Date: February 20, 2025** | **Version: Working With Newport** |

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| ***Section Type:*** | **Section Title: Working with Newport** |
| Meta | Tag  Newport Private Wealth: Working With Newport  Description  From opening the conversation to opening an account, the goal is for Newport to learn about you and for you to find out more about Newport. |
| Header | Working With Newport |
| Intro Blurb | **Your Expectations, Our Commitment**  Becoming a client involves three key steps that Newport will help guide you through: 1) Initiating a discovery meeting to discuss your financial goals and needs, 2) Developing a personalized wealth management plan tailored to your objectives, and 3) Facilitating a seamless transition of your assets. Once you become a client, our priority is to safeguard your financial health through robust account protection, detailed reporting on your portfolio's performance, and transparent governance practices to support your success.  However, it is so much more than reporting and governance… |
| Steps 1-4 | **Our Onboarding Process**  **Discovery**  Schedule a discovery meeting where we'll get to know each other. If we both see potential, we'll provide a complimentary proposal tailored to your needs.  **Planning**  We simply need you to provide your current investment statements for a comprehensive analysis, which frequently uncovers unexpected findings and gaps in your portfolio.  **Smooth Transition**  Once onboard, we handle all the details to transfer or open your registered and non-registered accounts, ensuring a smooth transition of your assets, whether in cash or in-kind.  **Building Your Wealth**  As a Newport client, we will work together to ensure that we build and safeguard your financial security through personalized investment strategies, comprehensive wealth management services, and proactive risk mitigation. |
| Account Protection | **Account Safety Above All**  We protect your through rigorous measures. Your assets are primarily held by an independent custodian (NBIN, a wholly-owned subsidiary of the National Bank of Canada) to your cash or investments. The custodian’s role, among other administrative duties, is to ensuresafe keeping of your assets. NBIN is a member of the Canadian Investor Protection Fund (CIPF). Additionally, independent valuation and recordkeeping are conducted for the Newport funds, while both the funds and Newport Private Wealth undergo annual audits by reputable firms such as Deloitte and PwC. |
| Reporting | **Clear. Comprehensive. Accountable.**  You'll receive clear and comprehensive quarterly portfolio reports, detailing your investments' performance and strategy commentary for ease of understanding.  Additionally, you'll receive account statements directly from our independent custodian, National Bank Independent Network (NBIN), with online access to your accounts.  Clients sign an IPS (Investment Policy Statement which sets the client’s investment mandate, and ensures the strategy is not revisited. However, we provide continual updates on broader macro market conditions and the actions we take at the Investment Committee (IC) level to manage assets wisely. These updates are made through various channels, including emails, blog posts, phone calls, and personalized meetings, particularly during challenging market periods.Top of Form  Bottom of Form |
| Governance | **Policies That Protect Your Interests**  Governance is fundamental to ensuring fair and ethical treatment for all clients, earning, and maintaining their trust. We adhere to the highest standards and best practices established by professional associations and regulators, fostering transparent communication and consistent execution to uphold our clients' interests.  Top of Form  Conflicts of Interest Disclosure Document [Link to PDF]  Bottom of Form |
| Cost | **Fee-Based Structure**  At Newport Private Wealth, we charge a fee for our investment management services rather than relying on commissions or transaction-based loads. Our fees are determined by the size and composition of your portfolio and encompass a range of wealth management services, including financial, tax, estate, and succession planning. As fiduciaries, our focus is on protecting and growing your investments, aligning our incentives with your long-term financial goals. |
| Video | [Video of Client Testimonial]  What Our Clients Say |
| Lonsdale | **Enter The World Of High-Net-Worth Investing**  Lonsdale Portfolios, a division of Newport Private Wealth, offers professional investment management tailored for families seeking a sophisticated portfolio approach beyond traditional individual options. If you are an individual or family with $300,000 or more to invest, you can become a client through an introduction from an independent financial advisor with whom Lonsdale has a referring relationship, or by reaching out to us directly.  Lonsdale [Logo]  Contact us [Button – Link to contact form] |