

TD Wealth

Are you getting what you're paying for when it comes to your wealth and investment advisor?



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MK | MacDonald
Konidis
Total Wealth Management Group

The Harwoods were hosting family dinner, as they do every Sunday. Their children and grandchildren were soon to arrive, to share stories of the past week's activities.

Cheryl was the first to arrive. On her way in she brought her parents' mail, and in it noticed a package from MK Total Wealth Management. Since her parents had been working with the MK team for only a few months, she asked if she could review their statements with them to ensure that everything was as it should be. Inside the package they found a detailed, tailored quarterly portfolio performance report and a quarterly commentary of the MK Total Wealth Management Group's views on the market. Cheryl had never seen this sort of transparency before, certainly not from her own investment advisor.

When Cheryl asked why there was no mention of fees associated with the management of their account, Lynn showed her daughter the agreement she and James had signed. To Cheryl's surprise, it

outlined in plain terms the management fee that her parents had approved, how it would be calculated and how it would be applied.

MK Total Wealth Management Team respects the hard earned dollars that our clients have accumulated. We dedicate our time into properly servicing each client's individual needs. We deliver a comprehensive, personalized approach to investment, wealth and retirement planning, wealth protection, tax and insurance solutions, business succession and sale planning, estate and trust planning, and charitable giving strategies. That said, your hard earned dollars are just one of the many relevant factors we will discuss with you in building our relationship. Why? Because we believe that all of our clients have the right to talk with someone they know and trust, and can relate to openly and honestly. We believe that total wealth management embraces far more than day-to-day investment advice.

MK Total Wealth Management Group

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