

What We Offer...

A Cup of Coffee and a Second Opinion

When the markets turn as volatile and confusing as they have over the past year, even the most patient investors may come to question the wisdom of the investment plan that they've been following.

At Plater Financial Inc., we've seen a lot of difficult markets come and go. And we can certainly empathize with people who find the current environment troublesome and disturbing. We'd like to help, if we can, and to that end, here's what we offer:

A cup of coffee, and a second opinion.

By appointment, you're welcome to come in and sit with us for a while. We'll ask you to outline your financial goals — what your investment portfolio is intended to do for you. Then we'll review the portfolio for and with you.

If we think your investments continue to be well-suited to your long-term goals — in spite of the current market turmoil — we'll gladly tell you so, and send you on your way. If, on the other hand, we think some of your investments no longer fit with your goals, we'll explain why, in plain English. And, if you like, we'll recommend some alternatives.

Either way, the coffee is on us.

PLATER
FINANCIAL INC.

*Professional Advice,
Personal Service*

Contact us at
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