

Creating and Preserving Wealth
For Generations...

Planifier et épargner pour
Les générations à venir



BRALEY WINTON PRESIDENT'S LETTER

JULY 2009

10 YEARS ALREADY.... a bit of history

July 1, 1999 was the first day of the rebirth of **H. Braley Insurance Services Ltd.** We were but a small company back then with only myself and Sylvie, wide-eyed and looking forward to an exciting future.

Our expansion started slowly with Robin Morton and Claude Courval joining us that first year. In 2000, Bert Dekoning decided to retire at the young age of 80 and entrusted us with his beloved clientele, many of whom have become true friends. We were now 3 advisors and 3 staff.

For those of you who know me, I have always had an eye on business opportunities and it goes without saying, the development of this business. We hired Jean-François Proulx away from Manulife to help us expand the wealth management side of the business in early 2001. With his help, we dove into a new adventure; purchasing another business belonging to Stanley Winton who had been established in the West Island for many, many years. No choice in the matter, we now had to leave our beloved downtown Montreal for Pointe Claire – poor Sylvie as she was living on the south shore. Robin Morton decided that he needed to remain downtown and left our group. In November 2001 we packed up our boxes and moved, becoming the **Braley Winton Financial Group.**

We were now faced with new challenges and we took them head on for the next few years, getting to know the clients and doing our best to continue offering service excellence. Our location in Pointe Claire was now too small to accommodate everyone as we were now 10, so we had to move to our current location.

Just as we were starting to settle in there was another expansion boom in 2004 with Doug West, Domenic Della Rocca and Henry Markey joining our ranks AND two additional assistants! We needed more space again so we tore down some walls and added some offices. Good thing Rita (my wife) loves to take on such projects. My son Herb joined us as Director of Ontario operations. His vast knowledge of life insurance is a great asset to us. Jean-François eventually left and Rino Marcone took on the role of Wealth Management Operations and is thriving at it.

Since that boom, some others have joined us such as Lynn Wilkins, Guy Girouard, Tony Della Rocca, Alex Elias, Michael Martin and the Mariani Financial Group. We now had to take over the whole floor! Once again, walls came down, walls came up and more redecorating! A bigger boardroom too! Rita surpassed herself this time – the place is beautiful.

We are now close to 30 advisors and staff with over 275 million of assets under management and provide services to clients in Quebec and Ontario. We pride ourselves on the fact that we all work really well together in trying to come up with innovative ways to serve our clients, hopefully beyond their expectations. We have no qualms about utilizing the support of our valued suppliers when we have to as we fully understand that we cannot be experts in everything.

It's been a great 10 years (is it too early for the gold watch?) and I am certainly looking forward to at least another 10. Hey, I'm only 66!

In closing, I want to thank each and every one of our clients, staff and suppliers for without you we would not exist. I appreciate your confidence, support and friendship and we will continue to do everything we can to earn it.

Personal regards,

Herbert Braley Sr,
President & CEO

About Braley Winton

Braley Winton Financial Group is a privately owned financial services firm specialized in developing and implementing strategies that achieve a multitude of financial goals and help customers hedge against the many risks in life. Braley Winton's broad range of customized strategies include Saving, Tax-Planning, Home Purchasing and many others. Braley Winton operates in both Quebec and Ontario and has over \$300 million in assets under management. Through its partnership with the Executive Planning Group, Braley Winton can deliver its regional expertise in top-tier services on a national scale.

More at www.braleyfinancial.ca