

Lunch and Learn Session
May 15 2018 1130-1400h
Deep River Legion Upper Hall

Topic: Retirement Investing

The presentation on the topic of Retirement Investing will be made by Mr. Blair Cooper, President and CEO of Tradex Management Inc., a NAFR Preferred Partner.

Mr. Cooper will cover the following topics during the course of his presentation:

- Today's challenge versus previous generation
- Market update including the Trump effect
- Maximizing after tax returns
- Asset location vs. allocation
- Scam artists pursue adults over 50
- The Tradex difference

Tradex Management Inc. mission is to provide to current and former public servants, Canadian Forces personnel, RCMP members and their families trustworthy, professional, financial advice through high-quality mutual funds and other investments at lower cost. Founded in 1960 by employees of the Departments of Trade and Commerce and External Affairs for their colleagues, Tradex remains Canada's only not-for-profit provider of mutual funds and financial advice. Since its founding, Tradex has had a Board of Directors comprised of active and retired public servants.

Regardless of account size, Tradex Fee-Based accounts charge only 0.70% per annum (in contrast with typical 1.0% - 1.5%) on assets in portfolios of F-series funds. Tradex experienced, salaried professional advisors can assist you in portfolio creation/customization. Tradex will reimburse the \$200 annual administration fee and up to \$2,000 in transfer fees. Tradex does not charge any additional fees.

Join your fellow Algonquin Valley Branch members for lunch and an enlightening presentation on topics of interest on retirement investing.