



SHAH FINANCIAL PLANNING INC.

Keeping You Informed on Tax & Investments

Greetings!

Now Serving you with... A New State of the Art Back Office System

We are pleased to announce that we will be converting our current Back Office provider to a new state of the art system on June 26, 2017.

The current (old) system will be available till at least June 30th, 2017. However, please note that the data that you will see in the old system will be as of June 16th, 2017.

You will be emailed a user id and password which you will be required to change after the first time. If you have a new/updated email address please forward it to us so we can update our records. Alternatively you can also request your user id and password on or after June 26, 2017 by clicking "Register Now" at:

MyPortfolio.ShahFinancial.ca

The new client friendly system has many enhancements

- Ability to contact your advisor directly from the portal,
- A more robust user interface, showing graphs and charts to better visualise your portfolio,
- The ability to see how your individual fund has performed over a number of periods,
- Fund Facts will be sent directly to your portal and will be viewable at any time
- Statements and reports will be far more robust, showing much more data, with graphs and charts,
- any many more features.

Thanks for your continued support, please let us know if you have any questions or if there is anything you're working on that we can help with.

TFSA [Tax-Free Savings Account] @ 1.85%

RRSP Loan @ Prime + 0.50% TFSA Loan @ Prime + 1.0%

We are at your service. If you require further information/assistance, please do not hesitate to contact your [financial advisor](#) at Shah Financial Planning Inc.

Head Office's Hours

Monday to Friday ► 9:00 am to 5:00 pm

Thursday by Appointment ► 5:00 pm to 6:00 pm

No Inner Peace Without Financial Security


www.ShahFinancial.ca


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