SEPTEMBER I 2021

SV Wealth - Newsletter

Sabu Varghese, **MBA, CIM**
Portfolio Manager

Phone: (416) 499-1555
SVwealth@raymondjames.ca

www.SVwealth.ca

Back to School Already?

Just like that, it's back-to-school season. Where did the summer go? As kids of all ages go back to class, with all of the apprehension and excitement that may bring in these turbulent times, it's also a great reminder that in life, summer ends but the learning never does. We are always presented with challenges and opportunities to expand our knowledge and grow.

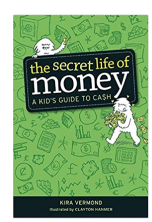
Welcome Ramzy Saad, CFA, MBA

At SV Wealth, we are also growing. I am pleased to introduce Ramzy Saad as my new business partner. Ramzy is a CFA charter holder with over 15 years of experience in various roles throughout the investment industry. Prior to joining SV Wealth, Ramzy was a Portfolio Consultant with the Private Client Solutions (PCS) team at the Raymond James Toronto corporate office. The team is expanding to help provide a next level of service to clients.

Agility. Stability. Consistency.

We have revamped our website and updated our domain name to svwealth.ca. You may have also noticed our new logo. We chose a hummingbird because it closely represents what SV Wealth is all about: agility, stability, and consistency. Agility in protecting your portfolio, stability in our approach to helping you meet your life goals, and consistency in our communications with you.

Financial Literacy Webinar Series



In the spirit of back-to-school, we will be conducting a pair of financial literacy webinars later this month. On Tuesday, September 28, you are cordially invited to join us and award-winning children's author Kira Vermond as we talk about teaching kids about money. As the author of "The Secret Life of Money – A Kid's Guide to Cash," Kira will show us some strategies on approaching the topic in a bite-sized, kid-friendly manner that will resonate with kids while setting them up for financial success.

SV Wealth
Raymond James Ltd.

8500 Leslie St, Suite #450
Markham , Ontario,
L3T 7M8

On Wednesday, October 6, we'll be hosting a webinar with the CPA Society entitled "Are you a Good Financial Role Model?" The CPA Society is a leader in the financial literacy space and will have some good tools on assessing how our behavior towards money influences children.

Please contact us at SVwealth@raymondjames.ca or 416-499-1555 to register for the webinars.

NewOffering–'WeekendReads' Premium Weekly Newsletter

We are also launching a new "Weekend Reads" premium newsletter, offering interesting articles from the Wall Street Journal, the Globe & Mail, the New York Times, the National Post, and more. The articles are ad-free and without a paywall. With four to six articles sent each Friday, you can expect to have something interesting on hand to read during the weekend. To sign up, simply contact us at SVwealth@raymondjames.ca.

WSJ The New York Times

Social Media – Like & Follow

As the SV Wealth team grows, expect to see more of us in social media. You can find us on Twitter at @SVwealth and on Facebook. Feel free to like and follow us as we'll be posting links to interesting articles and topics on a frequent basis.

Looking Ahead

Equity markets posted strong returns for the month of August, with the TSX gaining 1.5% and the S&P 500 adding 3%. With markets near record highs, we remain invested yet vigilant. We expect a bit more volatility as trading desks resume fuller operations with summer vacations behind us. In any case, we'll be there to protect your portfolio on the downside while trying to capture as much of the upside as possible.

--

We thank you for your continued trust and look forward to helping you with any new financial needs or goals that life throws our way. Best of luck for the start of the school year.

We'd love to hear what you think of the new changes - get in touch!