INDUSTRIAL ALLIANCE
SECURITIES INC.

Team Besler at IA Securities

>> Passionately committed to offering you exceptional wealth advisory solutions

Our Vision

>> We believe that you deserve an investment advisor who shares your vision, earns your trust and works diligently to help you attain the life you desire for you and your family. As we work together towards your goals, we are committed to providing you with distinctive, caring and personalized attention. Equally important is our attentiveness to helping you anticipate the changes and challenges in your life so you can be prepared to meet those circumstances when they arise.

"At IA Securities, Team Besler excels in providing experienced wealth preservation solutions which lower portfolio risk and reduce taxes. Investors who benefit most from this approach are those who value predictable solid returns and peace of mind."

Our Commitment

>> Our clients are the foundation of our practice. As such, we are committed to making a meaningful difference in their lives by guiding them to make well-informed financial decisions, helping them to attain their goals and striving to transcend their expectations. Our dedication to this commitment encompasses providing a high level of client service, both proactively and responsively. We endeavour to earn our clients' trust, thereby building long-lasting relationships with them and their families.

Peter Besler

Branch Manager
Investment Advisor

>> Peter has over 28 years experience as an investment advisor and over 12 years experience as a senior officer and head office branch manager in the securities industry. Utilizing his extensive knowledge, Peter developed a top ranked investment advisor training program and has successfully trained over 200 professionals to become investment advisors. Peter focuses on wealth preservation through risk reduction and advises most of his clients using a precise and disciplined approach. Peter maintains close contact with each of his clients and achieved EPC (Elder Planning Counsellor) certification in order to better understand and service mature investors. Peter takes the time to clearly and precisely explain his recommendations in order to ensure each of his clients understands and is comfortable with their investment choices.

Meet the professionals

Coming Soon

New Team Executive Assistant
New Investment Advisor

>> Team Besler is currently reinventing our approach to customer service. Using our extensive experience in the financial services industry, we are creating an innovative approach to the way we service our clients. This includes expanding our Team and the services we provide. We believe that our clientele will be both appreciative and highly impressed with the improvements we will make. We estimate this expansion to continue later into the year. In the interim, please contact us for further information.

Understanding

>> As investment advisors, we seek to understand our clients broadly and deeply enough to find opportunities that add value not only to their financial needs, but also to their life aspirations.

The way we do business

Caring

>> We know how hard our clients work for their money, and why. They do it to build a meaningful life for themselves, their family and their community. We work just as hard to help them achieve that life. We are backed by years of experience helping clients preserve and grow their wealth and access the depth of resources that comes from being part of one of Canada's leading financial firms. We have named this service philosophy "Wealthcare".

The Wealthcare Advantage >>

Wealthcare is our unique approach to our relationship with our clients and individually customized wealth advisory solutions. Our approach is simple. We want to know as much as we can about our clients, so we're in the best possible position to help them. And that doesn't mean we just want to know about their finances. True, we have to understand what your assets and liabilities are, and how your portfolio is structured. However, the more important information has to do with your goals for yourself and your family, your feelings about where you are and where you hope to be and, of course, your fears, and the things that might prevent you from getting what you want.

Discover Wealthcare provided by Team Besler

The Wealthcare Solution >>

We recognize that everyone is different, so we tailor our recommendations for each client's unique set of goals and aspirations. This in-depth knowledge of you, combined with our in-depth knowledge of planning and investing, will help us create solution strategies aimed at trying to achieve the things you really want. And we have the freedom to implement those strategies using the products, services and skills of a leading financial services firm. Please talk with us. We look forward to the conversation.

Core Values

>> Advising significant wealth appropriately requires advisors who are committed to a high level of personal attention as well as to constant improvement of their professional knowledge and service skills. Team Besler excels in adding the kind of value you expect from a business relationship while clearly relating to your personal values and lifestyle. We have developed a culture of client service excellence that is rarely duplicated by our peers.

We have termed this unique approach “Wealthcare” and strictly adhere to it’s core values:

1) Accessibility: We respect your time and the urgency of responding to your inquiries, therefore, we ensure our availability immediately upon your call 24-7 using advanced technology. Urgent email messages or voicemail messages will be returned within minutes. All investment advice will be presented to you through a personal conversation directly with Peter Besler.

Your experience as our Wealthcare client

2) Consideration: You are important to us and we will listen to your concerns and address them immediately. We believe our listening skills are paramount to delivering customized investment solutions to our clients. This ensures you are always in control of your money.

3) Communication: We will take the time to clearly describe each of our investment recommendations to you in order that you may be comfortable with them. Then we will monitor your investments and contact you immediately if any change is required.

4) Review: We value your questions and comments and regard them as an opportunity to learn how we may further improve our services. In order to help us, we offer each of our clients an opportunity to provide us with an anonymous review of our services annually.

Each client is of equal importance to us and we do not differentiate our level of service based on account size.

Our Team

>> Our team focuses on preserving your capital while utilizing our competitive advantages in the investing process to enhance the growth potential of your investment portfolio. This philosophy is intended to improve the predictability of returns while reducing the corresponding level of risk. We deliver competitive advantages in all three major categories of the investing process:

1) Knowledge: Beyond our numerous professional designations, we leverage our client product offering from our intellectual proficiency in technology, geology, economics, options trading and investment banking. Very few of our industry peers possess such diversified skill sets and our clients appreciate the value we add as a result of this distinction.

Wealth advisory resources

2) Diligence: In order to identify potential investments for our clients we draw on a wide variety of resources provided through our extensive network. This includes three teams of analysts and numerous contacts within the securities industry in Canada, USA and internationally. Should we require further due diligence, we will frequently contact management or visit the company's plant or offices first hand. We are known to fly by helicopter to investigate natural resource opportunities in the Far North and break trail in the jungles of South America and Africa to verify potential new discoveries. You may be assured that we continuously gather all the relevant facts before making an investment recommendation. We strive to lower risk and increase return through accurate information.

3) Experience: We have successfully guided our clients through many periods of extreme market volatility and are seasoned veterans of challenging investment climates. Our clients take comfort in our increased level of communication with them during turbulent times.

Team Besler at IA Securities

As Investment Advisors at IA Securities, an industry-leading full service brokerage firm, we have access to a global platform of resources that enables us to select the products and services that match the diverse financial needs of our clients.

We offer a complete range of investment advisory services, business owner services and investment planning services

- Alternative Investments
- New Issues and IPOs
- Fixed Income Portfolios
- Exchange Traded Funds
- Options Strategies
- Tax-Free Savings Accounts
- Risk Reduction Strategies
- Tax Efficient Investments
- Individual Pension Plans
- Employee Stock Option Plans
- Business Succession Plans
- Personalized Pension Solutions
- Retirement Planning
- Education Planning
- Portfolio Advisory Group
- Online Account Access

26 Wellington Street East
Suite 900
Toronto,ON
M5E 1S2

Telephone: 416-594-2257
Toll Free: 1-888-565-5503

www.beslerfinancial.com
pbesler@iagto.ca