It Feels Good to Give

You may know that each calendar quarter, I donate $1,000.00 to a worthwhile charity. I contribute on behalf of myself and my clients, as a way of saying "Thank you!" to all my clients. It's another reason for us to feel good about the work we are doing together.

This quarter I have chosen Dolly Parton's Imagination Library. Recently my assistant Jennifer and I attended Dolly's concert in Toronto and I was moved when Dolly told the story about her father's inability to read, and how it inspired her to start a program geared to fostering a love of reading among preschool children and their families by providing them with the gift of a specially selected book each month. By mailing high quality, age-appropriate books directly to their homes, Dolly wanted children to be excited about books and to feel the magic that books can create. Moreover, she could ensure that every child would have books, regardless of their family's income. Since the initial program launch, Dolly Parton's Imagination Library has gone from just a few dozen books to over 60,000,000 books mailed to children in the United States, Canada and the United Kingdom. Currently the Imagination Library provides books to over 750,000 children each and every month. As an avid reader, I am proud to support such a worthwhile cause.

Clients' Corner: A Client Perspective – Working with Thie

My familiarity with Thie's professional services comes about perhaps in a less than traditional fashion in that I am the executor of my late parents' estate. I first met Thie several years ago, when my mother was still living, but she was at the point of needing some assistance in her financial affairs. I liked Thie from the start and one of the things that has always impressed me is her great concern – not just for the portfolio of her clients – but for the clients themselves. Over the past two years, I have had numerous conversations with Thie, and while I am not an expert by any means, I found my mother's account to be incredibly well managed, with diverse holdings that not only weathered in good fashion the inevitable ups and downs in the market, but that, in many instances, produced a phenomenal rate of return. As a non-resident Canadian, I am prohibited from having an account in Canada but I am looking forward to my retirement back to Canada for a number of reasons; among them, I will be able to invest with Thie! And if my future portfolio with her grows as nicely as my parents did, I will have an added reason to celebrate.

Dr. Gwyn E. Campbell
Professor of Spanish, Lexington, Virginia, USA

Thie C.L. Convery, *Wealth Advisor* — ***Tel:*** *905-627-9970 x1* — ***Email:*** *thie.convery@ipcsecurities.com*
Steve Sztricsko, *Investment Advisor* — ***Tel:*** *905-627-9970 x3* — ***Email:*** *s.sztricsko@ipcsecurities.com*
Jennifer Moumblow, *Client Service Assistant* — ***Tel:*** *905-627-9970 x2* — ***Email:*** *jennifer.moumblow@ipcsecurities.com*
Office Address: *229 King Street West, Dundas, ON L9H 1V6* ***Web:*** *www.ConveryWealth.com*

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Winter 2017

Wealth Solutions *for Life*®

CREATING WEALTH SOLUTIONS FOR ALL ASPECTS OF *YOUR LIFE*

2017 – Your Best Year EVER!

I'm writing this on the very last day of 2016 and I can't believe that the year is over. (Remember Y2K? That was seventeen years ago!)

Like many folks, I will set resolutions for the forthcoming year, but I always take a few hours on December 31st to first review the past twelve months. I find this gives me tremendous perspective for the year ahead.

To start, I'll separate my goals into the following life areas:

- Health / fitness
- Personal growth & development
- Significant other / life partner
- Family / friends
- Financial / wealth
- Career / business
- Spirituality
- Fun & recreation
- Contribution / giving
- Physical environment (home/office)

Then, I'll ask myself the questions listed below with respect to each of the life areas and write down my answers. (I'm a little old-fashioned in that I still prefer a pen and paper. For me, the physical act of writing stirs my brain differently than using a keyboard.)

The questions that I ask myself are:

1. What were my successes and accomplishments in 2016?
2. How did I specifically make them happen?
3. Where did I come up shy of what I planned for 2016?
4. Why and how did that happen?
5. What are my goals for 2017 in the ten life areas?
6. How will I specifically make them happen?

I carry these goals in my calendar – yes, a *paper* calendar – because it helps me determine if the actions I'm taking every day and every week are getting me closer to or further from the goals that I set at the beginning of the year. This way, I can make immediate daily decisions to reinforce my direction or eliminate those things which pull me off track.

I'd encourage you to take a wee bit of time to look toward this new year. Feel free to utilize any of my ideas above to help you set your goals for 2017. I guarantee that the next 365 days of your life will pass in what feels like a blink of the eye and your decisions and actions today will determine the consequences of your 2017 life goals.

If you'd like help – in *any* of the life areas, not only in the financial or wealth area – just send me your answers to the above questions and I'll promise to help hold you accountable to your *own* life goals... even if you're not currently a client of Convery Wealth. I'm in your corner – and your greatest cheerleader!

Here at Convery Wealth, we help our clients create Wealth Solutions *for Life*®. So if any of *your* life goals have a dollar sign attached, we can help bring them to fruition. Just give me a dingle today at 905-627-9970. Or send me an email at thie.convery@ipcsecurities.com. We'll have a chat to determine your next step in achieving your wealth goals for 2017.

To your best year EVER!

Thie C.L. Convery, Wealth Advisor
B.Sc.(Hons), R.F.P., CFP®, CIM, FMA, FCSI
229 King St. West, Dundas, ON L9H 1V6
Phone: 905-627-9970 x1
Email: thie.convery@ipcsecurities.com
Web: www.ConveryWealth.com

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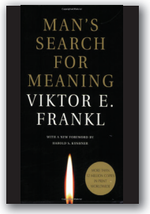
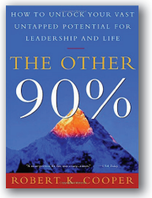
Thie's Picks: Books You Might Enjoy



"Man's Search For Meaning — An Introduction to Logotherapy"

by Viktor E. Frankl

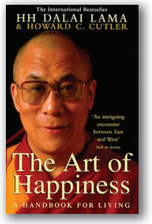
I'm sure I have read this book ten times or more. And a physician friend recently read it and thought I should include it here. Dr. Frankl was also a physician, neurologist and psychiatrist, as well as a Holocaust survivor. This book chronicles his experiences in a concentration camp, which led him to discover the importance of finding meaning and purpose in all events of our lives, even within the types of horrors he endured. Frankl says, "When we are no longer able to change a situation, we are challenged to change ourselves". This book is good for your soul!



"The Other 90% — How to Unlock Your Vast Untapped Potential for Leadership & Life"

by Robert K. Cooper

Perhaps you already know that all of us are probably not living at our full capacity. Dr. Cooper, a neuroscience pioneer and leadership advisor, says that we are mostly unused potential, employing less than 10% of our brilliance or hidden talents. His book explains how to develop and apply the art and science of our hidden capacity, so that we can make a difference in our own lives and in the lives of others.



"The Art of Happiness — A Handbook for Living"

by His Holiness The Dalai Lama & Howard C. Cutler, M.D.

The spiritual leader of Tibet, a Buddhist monk, a peace activist, a Nobel Prize winner and a popular speaker, the Dalai Lama tells us that happiness is the purpose of life. In this book, he answers the question of how to get there. To him, compassion and loving kindness are the keys.

Thanks for the Introduction!

I personally want to **"thank you"** for introducing your family, friends, neighbours and colleagues to Convery Wealth. Your confidence in me and the Convery Wealth Team is my greatest compliment!

Terry F. referred Duncan & Terri W. • Gwyn C. referred Peggy B.
Hélène C. referred Melissa L. • Sari C. referred Brenda I.

Thie Convery's Professional Development for 2016

Each year, I seek and engage in a wide range of courses, seminars and conferences to enhance my professional development. In 2016, as in previous years, I spent many hours honing my skills in order to continually bring the most current and informed ideas to my wealth advisory practice. Below is a summary of my professional development for 2016.

DATE	# OF HRS	ACTIVITY
Jan. 18	1	NCE Flow-Through 2016 - Sentry Select - webinar
Jan. 27	0.5	Q4 2015 Report Card - Counsel Portfolio Services - webinar
Feb. 11	1	Compliance: Enforcement & Registrations Update - IIROC - webinar
Mar. 21	0.75	Compliance: Cybersecurity - IIROC - webinar
Mar. 28	2	Dementia Overview & Financial Ethics - Dementia Care Consulting - webinar
Apr. 2	2	Life & Insurance Taxation: Impact of New Rules - Advocis - webinar
May 5	0.5	Q1 2016 Report Card - Counsel Portfolio Services - webinar
May 7	0.5	Compliance: IIROC Registration (Operations and Rules) - IIROC - webinar
May 27	0.5	Compliance: IIROC Registration (Proposed Changes) - IIROC - webinar
June 1-2	7.5	Due Diligence - Counsel Portfolio Services - San Francisco, CA
June 14	1	Compliance: Dealing With Senior Clients - IIROC - webinar
July 28	0.5	Q2 2016 Report Card - Counsel Portfolio Services - webinar
Aug. 25	0.5	Finish Strong in 2016 - Dynamic Funds - webinar
Aug. 25	1.25	Compliance: Tips for Traders - IIROC - webinar
Sept. 12-13	9	Professional Development Conference - Investment Planning Counsel - Collingwood
Sept. 22	5	Professional Development Day - Advocis - Hamilton
Sept. 27	0.5	Compliance Priorities Report - IIROC - webinar
Oct. 5	6.5	Excelling in the Family Market - PPI Solutions - North York
Oct. 12	1.5	Key Markets for Critical Illness Insurance - BMO - webinar
Oct. 26	0.5	Q3 2016 Report Card - Counsel Portfolio Services - webinar
Oct. 30	1	Compliance: Social Media in the Investment Industry - IIROC - webinar
Nov. 8	5	Professional Development Day - Canada Life - Mississauga
Nov. 17	1	IIROC Compliance - IPC Securities - webinar
Dec. 16	0.5	Compliance Privacy Training - IPC Securities - webinar
Dec. 16	0.5	Compliance Anti-Money Laundering / Anti Terrorist Financing Training - IPC Securities - webinar
Dec. 21	1	Becoming a Complete Financial Planner - IAFP - webinar
TOTAL	**51.5**	**Hours of Professional Development in 2016**