



The Excellent Advisor

Complementary Quarterly Newsletter - Fall 2005 Edition.



Samir Stasi



Senior Financial Consultant

Planning for that next step in life isn't always easy. Every decision we make has a serious implication on our present and future financial situation.

I make it my top priority to give careful consideration to every area of your financial concerns. I work with other experts to develop and implement a comprehensive financial plan that suites your personal situation.

As an independent advisor, member of the Independent Financial Brokers of Canada, I believe that an independent professional, one who is not bound by proprietary contracts to sell the products and services of any one company, best meets the needs of the client.

Take advantage of our expertise, and gain trusted

Investment Planning

" Sizing up Income Trusts"

Advice on what to look for when investing in this high growth asset class.

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Sterling's World Report

Hurricane Watch:

How Has Katrina Changed The Investment Outlook?

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Living Wills

"Schiavo case breathes life into living wills."



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Housing Bubble Watch

New quarterly report monitors housing markets.

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Hedge Funds- What Is It?

advice to help you prepare for life's different events.

Call today to discuss how to fine-tune your financial plan.

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Long/Short Investors have Bases covered: Way to Balance Risk in One Sector.

Hedge funds have assumed a dramatic profile in today's capital markets. A hedge fund can be defined as an investment strategy that employs both long and short positions, uses leverage and derivatives, and is much less dependent on market direction than long-only investments such as stocks, bonds and mutual funds.

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Tax Talk

Transfer of Investment Losses between Spouses

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For steady, reliable income you've got to find the right balance...



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