
New Portfolio Strategies Software

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We'll ask everyone to bear with us in October as Portfolio Strategies will be moving to a new back office system called Viefund. This won't change anything with your investments but it will change the way us advisors do trades. This will mean some new forms and more client-friendly systems for doing business. I expect that there will be a pretty big learning curve for Patrycja, Natalie and me, but we are looking forward to using the new software! Viefund has better electronic systems for doing trades and will have nicer reports for clients. We've already taken in a number of demonstrations on the new software and will be transitioning into it by the time you get this. We expect that there will be some changes for logging in after the transition is complete. We'll figure all of this out and will be able to help clients with any questions that they may have.

2022 has continued to be a challenging year but there is some good news to report. As painful as these Interest Rate Hikes from the Bank of Canada have been, they seem to slowly be working. Inflation in Canada has come down to 7%¹. Still a very high number, but at least we are heading in the right direction. We've been out doing a lot of meetings going over Inflation and Interest Rates with clients and talking about how different this year has been with situations we haven't dealt with in many years. These are interesting and difficult times so please, reach out if you'd like to talk. That's what we are here for.

Have a great October and a great finish to a tough year!!

Bryce A. Borden

¹Statistics Canada: - <https://www150.statcan.gc.ca/n1/pub/71-607-x/2018016/cpi-ipc-eng.htm> [1]

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Links

[1] <https://www150.statcan.gc.ca/n1/pub/71-607-x/2018016/cpi-ipc-eng.htm>