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THE JOHNSON LEGACY REPORT

Building Trust for Generations



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THANK YOU! THANK YOU! THANK YOU!

Our number one priority is always you. In times of uncertainty, making sure you are safe, healthy and feel confident with your investment and retirement plan becomes even more important to us. Let's face it, COVID-19 has affected every single Canadian's investment and retirement plan in some way or another. Whether they are a small business owner who is unsure their business will survive, or someone in early retirement who wanted to travel around the world. Yet, the truly scary part is that, based on a study RBC did in 2019*, nearly half (48%) of Canadians who are saving for retirement don't even have a financial plan.

One of our goals is to grow our business every year by way of introductions from existing clients, centres of influence and other professionals. We are on a mission to work with new clients who aren't getting the same level of care and results from their advisor (or themselves) as you are. Things have changed in the past six months and a lot of people have questions that need answers. We're here to help answer those questions.

The feedback we've received from clients (both long-term and new) over the past few months has been very positive, and affirms our conservative and caring approach to wealth management. We are truly grateful many of you have introduced us to your friends and family over these past few months. It is gratifying and humbling to know that, during these challenging times, our efforts on your behalf are both understood and appreciated. Again, thank you!

If you think a friend or relative could generate better results by working with our team, below are a few easy steps you can follow. These steps can also be found on our website under [Our Introduction Process.](#)

1. When you are talking with someone you think might need our services, feel free to share with them what you like about our approach to Wealth Management.
2. If any interest is shown, ask if additional information might be useful, and offer directions to www.johnsonlegacy.ca
3. With approval, forward their contact information to us.
4. We will then make contact with them to arrange a meeting. Our offices are still closed, but we can arrange a virtual meeting or a conference call.

Regardless of the outcome of our first meeting, anyone you introduce will receive the same respectful and professional treatment that you enjoy. The objective of our first meeting with a prospective client is to determine if the "chemistry" is right, and if so, whether objectives and expectations are compatible with our philosophy and methods. If there is a good fit, we will schedule subsequent meetings for more detailed discussions.

If we should determine that there isn't a good fit, we still want the first meeting to be of value – and to reflect positively on you - so we will offer suggestions as to where and how your friend or family member might find what they need.

We appreciate the trust you place in us and will continue to work hard to deserve it. We look forward to working with both existing and future clients in 2020 and beyond.

Survey source: <https://insurance-portal.ca/article/nearly-half-of-canadians-dont-have-a-financial-plan/#:~:text=Non%2Dretired%20Canadians%20have%20the,in%20Retirement%20Poll%2C%20released%20today.>



Johnson Legacy
WEALTH MANAGEMENT

RAYMOND JAMES



Market Pulse:

Major Stock Indexes	Level/Price	YTD Return Ending June 30th/2020
S&P/TSX Comp	15,515	-9.07%
S&P 500 Comp	3,116	-3.56%
Dow Jones Industrial Avg	25,735	-9.82%
Major Bond Index		
Dex Universe	1,208	7.53%
Commodities		
Crude Oil - WTI (US\$/bbl)	\$40.15	-34.25%
Gold (US\$/oz.)	\$1,776	16.57%
N. Gas (US\$/MMBtu)	\$1.69	-22.98%
Currency		
Canadian Dollar (CAD/USD)	\$0.74	-4.27%

Source: FactSet, Raymond James Ltd.

Personal Updates:

Jay and the family don't have a lot of things booked this summer. Other than their usual camping trip to Kettle River provincial campground the second week of July and maybe a trip to Whistler at the end of August they will be staying close to home. Since Jay's plan to ride across Saskatchewan in June and the Ride to Conquer Cancer in August was cancelled, Jay hasn't been on his road bike at all. He isn't upset about that because the conditions for mountain biking so far this year have been amazing.

It was feeling like Groundhog Day every day for a number of weeks for Lori. Finally in June when restrictions relaxed, she was able to change things up by getting a haircut, manicure, pedicure, facial and massage. She's starting to feel more like herself with the help of all of her professionals!

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