THE TYLER GROUP Financial Services

Sound Advice

The True North Formula

By Rod Tyler, CFP, R. F. P. , CLU

For a combined 74 years Al, Rod and Gene have been offering clients financial planning advice. The usual starting point for a large portion of our clients has been centered on getting advice on investments and retirement, reducing their income taxes or paying off their home mortgages. Over time these relationships strengthened and developed, and other forms of advice and pieces of the process continued to expand. They grew to include such topics as care of elderly parents or helping children through college and university. What we first knew inherently became evident with time and experience; There are essentially 7 Pillars around complete financial planning.

We also know that while the “how” of good advice is important, the “why” of good intention is even more important. We realize that everyone has a desired financial destination, and that exact destination is different for each person. Our experience has also shown us that as a client’s life unfolds and their needs evolve, the path and process should and must evolve as well. The ultimate destination of any individual plan is what becomes our client’s True North, and we provide the compass that keeps them on track. This is how our proprietary process, the **True North FORMula**, was born. The goal of our process is to take all the pieces of our clients individual financial puzzles and to put and keep them in place, always working towards their True North.

How do we identify a client’s **True North**? We have found that it almost always revolves around three key concerns: Family, Occupation, and Recreation. These are the "whys" of financial planning, the reasons our clients are interested in saving for and protecting their own futures and those of family and heirs. Continually guiding our clients to their True North is a foundational approach at The Tyler Group and one we never lose sight of.

All of us at The Tyler Group look forward to working with you and your family, to hear about your own goals and concerns, and to help you reach your own True North.

The Real Value of
The True North Formula

Perhaps you are wondering what the **True North FORMula** means to you. If that's the case, then let me share with you how we use this process to help our clients achieve their financial goals and personal freedom.

Let's start from the beginning. When we start out in life, we often have some ambitious goals, and then life happens. It is easy to get side-tracked when our lives evolve and unfold and things change. The **True North FORMula** is a process that we have developed and perfected that helps our clients stay on track and that ultimately provides them with a work-optional lifestyle. Some of our clients continue to work part time because they enjoy their friends and the experience, while others prefer to retire and pursue personal interests outside of the work place. The **True North FORMula** is designed to provide our clients this choice of a work-optional life, while meeting all their other interests and concerns.

We look forward to speaking with you in the near future about how we can help you and your family benefit from all the advantages of the **True North FORMula**.

THE TRUE NORTH FORMULA
by The Tyler Group Financial Services

Why We Chose a Tree as Our Logo

By Rod Tyler, CFP, R. F. P. , CLU

About 20 years ago, we decided to refresh our company image and logo. I knew we needed to retain a professional designer who could capture the essence of our business of providing professional financial advice. The designer came to our office and asked a lot of questions about the services we provided our clients. Then he went away.

Two weeks later, he came back with several hand-painted images. The image of a tree was his recommendation, and we immediately agreed it was a perfect choice. Here is why.

We are a Regina based company, and we live on the great plains. There were no trees in this area until the earliest residents began planting trees, beginning in the 1880's. Regina now boasts one of the largest urban parks in the world, all the result of the foresight and commitment of our forefathers, 140 years ago.

If we bumped into you on the street and asked, "what do you think trees and financial planning have in common?" you might laugh and look at us funny. Of course, there's no connection…or is there? The thing about trees and financial plans is that for them to become what we envision and hope for, it takes vision, experience, time, and above all else, patience. Most trees must be staked as saplings to ensure that they start out protected against forces that can damage their growth permanently. As they grow, the fertilizer and water needs change and at times it seems as if nothing happens for months or even years at a time. Winters sometimes seem long and the growing seasons short. The dormancy and loss of leaves have us longing for the rebirth of spring, and eventually spring does return.

In the end, it is the patience and vision, experience and care, that allows the trees to grow and prosper and provide the shade and comfort to so many. Amazingly after what appears a slow start, those trees provide that shade and comfort to generations beyond those who originally planted the tree.

There's a reason we use a tree as our logo at The Tyler Group.

"Someone is sitting in the shade today because someone planted a tree a long time ago."

WARREN BUFFETT

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