> *Smart Risk* will challenge the fundamentals of your financial decision-making process. A must read for all investors!

Victor G. Dodig,
President & CEO, CIBC

SMART RISK

ABOUT SMART RISK

Investing is risky, and successful investors know what it means to take "smart risks." In *Smart Risk*, leading wealth catalyst and portfolio manager Maili Wong shares her techniques through the power of storytelling, to help Canadians build an investment strategy and roadmap leading to a Work-Optional Life – having the freedom to live the lifestyle you choose, regardless of market conditions.

Smart Risk helps investors overcome a number of common fears including outliving their capital, investing in volatile markets and even the fear or risk itself. How? The Smart Risk Investing approach balances art and science in a process for making financial decisions that continually stack the odds in your favor - to increase your chance of successfully reaching your financial purpose and goals. It often involves adjusting your mind-set and recognizing the internal biases that may be holding you back from achieving long term financial success.

You don't have to be ultra-wealthy to apply the secrets to achieving retirement sooner and enjoying a Work-Optional Life. To overcome challenges faced amidst today's changing investment environment, *Smart Risk* outlines a path for Canadians investors to first think differently about risk, and then embrace action to ultimately create financial empowerment and lasting financial freedom.

Smart Risk shows investors how to overcome challenges by putting emotions aside to achieve their lifelong financial goals with the "5 P's":

PURPOSE
Define your end goal & identify your big "Why".

PEOPLE
Build a "Circle of Trust" to achieve your goals.

PLAN
Create a wealth-catalyzing financial and investment plan.

PERSPECTIVE
Develop a healthy mindset like the ultra-wealthy.

POSITIVE ACTION
Take actionable steps to achieve your purpose.

LET'S TALK ABOUT RISK

Knowing the difference between a good risk and a bad risk is vital in the world of investment and retirement planning. In Smart Risk, leading wealth catalyst and portfolio manager Maili Wong shows how to achieve your financial purpose with her **Smart Risk Investing Roadmap**. The roadmap builds a foundation based on her **5 P's**: Purpose, People, Plan, Perspective, and Positive Action.

Maili shares valuable lessons from successful (and some not-so-successful) investors to give Canadians a look at the roadmap in action. This inside perspective helps investors identify what challenges may be holding them back from their full financial potential and achieving a Work-Optional Life.

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> You have achieved a great measure of success yet you've remembered the stepping-stones along the way including your grandfather, father and the rungs of the ladder you have climbed. You are inspiring.
>
> **Joseph Segal,**
> President, Kingswood Capital Corporation

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About Maili Wong, CFA

Maili Wong has spent her career leading people to financial safety and security – showing them there is a way forward to achieving their financial freedom.

Maili is an author, a leading Canadian investment advisor and licensed portfolio manager whose fresh, modern approach to investing for her high-net-worth clients sets her apart from others in her field. Her first book ***Smart Risk*** shares per personal story of resilience as well as lessons learned and secrets gleaned in her 15 years of international investing experience.

Maili called New York City her home for five years, during which she helped manage over $5 billion in assets for Eton Park Capital, an award-winning investment firm seeded by Goldman Sachs. Prior to that she specialized in derivatives and options at Merrill Lynch headquarters, also in New York City. Maili also worked in Toronto, Canada on the investment team for a global insurance company in 1999.

Maili graduated as 'Most Outstanding Female Graduate' from the University of British Columbia with a bachelor degree of commerce in Finance with honours. While attending UBC, she was chosen to manage a multimillion-dollar endowment portfolio as a member of the Portfolio Management Foundation and simultaneously served as an elected member of the University's Board of Governors.

Maili is a Chartered Financial Analyst® charterholder, CERTIFIED FINANCIAL PLANNER® practitioner, licensed life insurance advisor, and a FAMILY ENTERPRISE ADVISOR™ certificant specializing in helping affluent families transcend their wealth across generations.

Maili is known for her commitment to delivering complete confidence in her financial advice and client relationships. She and her team are proud to be recognized as being catalysts for building client wealth.

> Maili Wong's *Smart Risk* is the smart choice for any person or family attempting to look over the horizon at their financial future. She presents a roadmap, like a seasoned Commander issuing a pre-battle order, yet the book is personal and filled with warm stories and clear, concise, practical applications.
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> **Art Gorman,**
> Financial Advisor at Wells Fargo Advisors in New York City and former Chief Operating Officer for Municipal Markets / Public Finance at Bank of America / Merrill Lynch in New York