



# THE SPECIALIST

## Significant Changes



While summer is generally a slow time of the year, it has been anything but at Brady Financial and I am pleased to tell you about a number of significant developments over the past few months.

Our annual Golf Classic once again surpassed last year's total raised for the YMCA's Strong Kids program. This is such a worthy cause and I am immensely proud of our connection with the Y and our ability to play a role in changing children's lives. A special thank you to Rob Green for once again chairing the golf committee.

We have some significant developments in our Royal VIP Health Options service. Not all of you are members, but we like to keep you abreast of the tremendous strides we are making to create a program that is unique in Canada. I encourage anyone who has not at least looked into this program to do so. I'm confident you will immediately see the value.

The annual client survey has once again shown that we are meeting or exceeding your expectations in products, service and our ability to meet your needs. While the results are encouraging, we continue to work hard to deliver the best solutions and customer service we can provide. The survey is merely a guide to ensure Brady Financial remains among the top in its field. We have more on the survey and the results in the newsletter.

Since this is our last newsletter of the year, let me take this opportunity to thank you for your business and to wish you and your family the happiest of holidays and a prosperous 2009.



From left to right: CFL great Russ Jackson and Kevin Brady, present a cheque totalling \$328,604 to Jim Commerford, President and CEO of the YMCA of Hamilton/Burlington

## Golfing for kids

Another successful Brady Financial Group Golf Classic raised a record \$65,000 this fall – money that will help hundreds of children from low-income families gain access to a YMCA program.

The significance is that this gives children the opportunity to grow, build new skills and increased confidence. Or as Russ Jackson likes to put it, an investment in a child to attend a YMCA program has a more

meaningful impact because “it’s easier to fix a kid than it is to fix an adult.”

“Kevin and the team from Brady Financial Group Golf Classic have been committed to helping children in our community through the work of the YMCA of Hamilton/Burlington for seven years – and more than \$320,000 has been raised in that time,” says Bryan Webber, VP, Financial Development for the Y.

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# Royal VIP Health just got better

Some exciting new developments continue to make the Royal VIP Health Options program unlike anything else in the country. Dr. Richard Heinzl has been appointed Canadian Medical Director, Bayshore Home Health has become a partner and the Mayo Clinic has joined the Second Opinion service.

A graduate of McMaster University, Dr. Heinzl also studied at Harvard and Oxford, he is a specialist in preventative medicine and is the founder of Médecins Sans Frontières (Doctors Without Borders) in Canada. As Medical Director, Dr. Heinzl will assist in managing your health and help you navigate a complex health care system.

Bayshore Home Health offers a wide range of home and community health services and will provide a significant discount on all its services, exclusively for Royal VIP Health Options Members as well as their extended family (i.e. parents, siblings, etc.).

The Second Opinion service just got stronger with the addition of the world renowned Mayo Clinic, which is ranked

No. 2 among America's Best Hospitals by U.S. News & World Report.

## Speaker Series

Members were recently treated to an entertaining and enlightening conference on June 19 with Chris Crowley, a New York Times bestselling co-author of the *Younger Next Year* books, which have been called the boomers' bible – covering wellness issues for the baby boomer generation. Chris talked about the secret as to why some people live long, highly active and productive lives right to the very end whereas most do not. It was exactly the type of message that clients wanted to hear. In fact, Chris spent two hours signing his book following his talk.

All the guests said the conference was well worth attending, that it was informative and the speakers were excellent. Some of the written comments included: "The benefit was being in a room with like-minded individuals and the positive focus on wellness" and "It was a good wake-up call" and "The speakers were motivational and informative."

## Improving the way we serve you

Each year Brady Financial Group conducts a client survey through a third party service and once again the news is good – virtually all of you or 99 per cent are satisfied with our products and services. The vast majority of you – 92 per cent – are "very satisfied" with our relationship.

"Two hundred clients were surveyed and 38 per cent responded, which is an incredible return for a survey, so thanks to all of you who took the time to complete the survey," says President Kevin Brady.

Once again, you gave Brady Financial high marks for being trustworthy, having confidence in the firm's skills, being proactive in managing your benefits plan, meeting all your financial needs, negotiating the lowest insurance premiums and being responsive.

One area that we were really proud of was in how you are greeted when you call the office. "I'm proud that we have a strong team of dedicated representatives," Kevin says.

"The objective of the annual client survey is to ensure we are staying abreast of your financial needs, wants and desires. We're not content to rest on our laurels, but rather intend to continue to look at how we can improve our products, our programs and our service to better serve you," Kevin explains.

**One area that we were really proud of was in how you are greeted when you call the office.**

Thank you to everyone who took the time to respond to the survey and congratulations to Ian Cunliffe of Lakeside Logistics, the winner of our draw for dinner for two.

# HR solutions proving to be popular

The growth of HR Off-Site, one of Brady Financial's partner firms, has been dramatic – doubling its business in just the past 12 months.

Much of the demand for their services is coming from small and mid-sized firms that often can't justify the expense of a full-time Human Resources person. The ability to have professional HR expertise at their fingertips, therefore, has been invaluable.

"A growing number of our clients have contracted HR Off-Site or inquired about their services," says Brady Financial President Kevin Brady. "The professionalism and expertise of Paddi Riopelle, her colleague Cindy Paskey and her team have allowed our clients to take their HR processes and programs to a higher level."

Even clients with HR staff may find they need additional help with specific issues and will find Paddi's expertise in union matters, legislation issues such as pay equity, and change management, a helpful resource, Kevin adds.

HR Off-Site, for example, was able to provide valuable service to Skyway Lawn Equipment in Stoney Creek.

"We recently relied on HR Off-Site Human Resources Solutions to help us sort out a particularly difficult situation involving an employee," says Heidi Burgess, Secretary-Treasurer. "As a family-run business with

perspective we needed, completed all of the WSIB paperwork quickly and efficiently, and made us feel confident in the course of action we took. I will not hesitate to call her again."

Paddi, who has more than 20 years experience, has a Certified Human Resources Professional designation, which

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under 20 employees, we don't have a Human Resources department. It was really important to us to be fair, but we simply couldn't take the time to truly understand what was behind the individual's frequent absences and injuries. Paddi's patience, professionalism and attention to detail were incredible. She gave us the impartial

allows her to provide advice on employment matters. She also offers a menu of services tailored to the specific needs and budget of its clients.

*Please contact Brady Financial Group if you would like us to arrange a complimentary visit.*

*Continued GOLFING FOR KIDS*

Bryan adds that as a past Chair of the Board of Directors of the YMCA of Hamilton/Burlington, Kevin understands the impact of YMCA programs on children in the community and the importance of engaging his corporate team to volunteer their time and talent to this community organization.

"Increasingly, progressive businesses like Brady Financial Group are seeing beyond the traditional bottom line of profitability, and accepting their responsibility to give back to the community that supports their business," Bryan concludes.

"I want to thank all the golfers and sponsors who have made this tournament a success and for a contribution that will help our youth develop into leaders of tomorrow," Kevin says.

See you next year, and remember to book early because the 144 spots go quickly.



TOP LEFT Left to right:  
Tara Carruthers, Donna Sloman,  
Greg Padovani, Domenic Tesone,  
Dalton Timmis Insurance



BOTTOM LEFT Left to right:  
Jeff Joanovic, Mike Malka,  
John Davidson, Jerry Heatley

ABOVE Left to right:  
Mark Tyleman, Kim Hoang,  
Jim Albanese, Geoff Hogarth,  
Pioneer Petroleum



The Brady team from left to right: Bernie Knowles, Kristin Vaughan, Barbra Pustai, Jackie Drawbell, Barb Brady, Debbie Chubb and Patti Nesbitt.

# Run for the Cure

Every year for the past five years the staff at Brady Financial and their spouses have participated in the annual Run for the Cure to raise funds for breast cancer research, education and awareness. I was very pleased that the group raised more than \$6,500, a total that continues to rise. Thank you to Patti Nesbitt and Barbra Pustai who led the way.

## STAFF NEWS

We are pleased to announce the following additions to the Brady Financial team and promotion.

Melanie Merbs, who previously provided customer reception support when you called the office, has been promoted to a Group Customer Service Associate and will be responsible for customer service to our Employee Benefit clients.

Kristin Vaughan is now the new voice greeting you when you call. Kristin, who started in August, has a customer service background and will provide corporate support in all areas. Mary Devereaux is our Group Customer Service Associate. She comes to Brady from a large insurance

carrier and brings a tremendous amount of experience. Mary will be responsible for the customer service to our Employee Benefit clients.

With the growth of Royal VIP Health Options we wish to welcome Wanda Garcia to the team. Wanda comes to us with a strong customer service background and will handle the day-to-day customer service for the company.

And welcome to two additions to the Brady Financial extended family – Taylor Lalande, born to Customer Service Associate Amy Lalande and husband Matt, and Emily, a new daughter for Benefits and Pension Consultant Rob Green and wife Heather.



Melanie Merbs



Kristin Vaughan



Mary Devereaux



Taylor Lalande



Emily Green

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