RICHARDSON Wealth

LALLI GRECO WEALTH MANAGEMENT

Our Philosophy

Time Well Invested

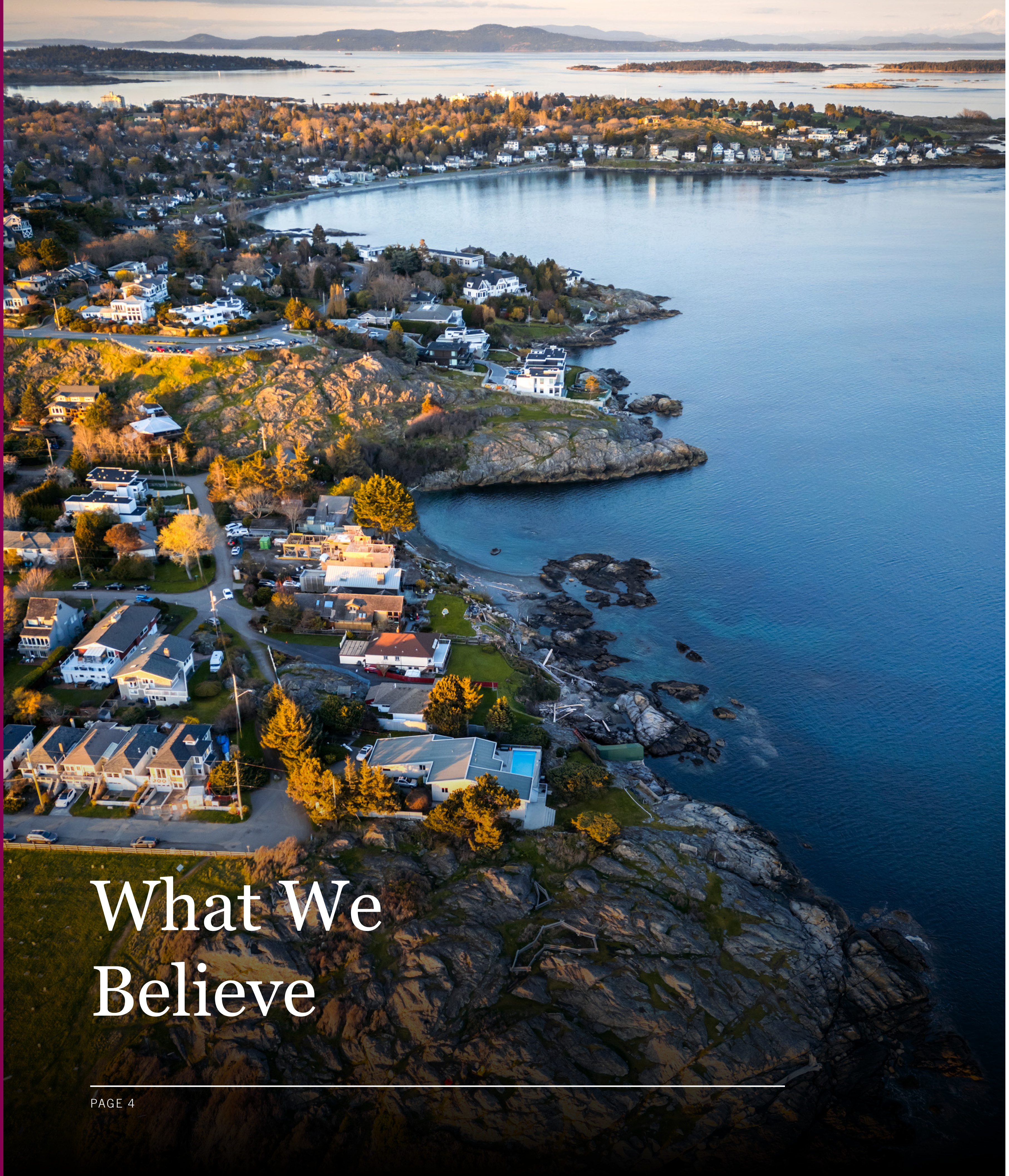
You worked hard to build a good life. Now you want clarity.

What's enough? What's next? When can you start living your dream life—without second-guessing every decision?

Lalli Greco Wealth Management is here to **liberate you to enjoy life now.**

We build a plan that makes **choices clear** and **next steps obvious**—so the time you spend with us gives you time back.

That's time well invested.



What We Believe

It’s time to start living your dream life

When your whole financial picture is clear you can live life on your own terms.

Education builds confidence

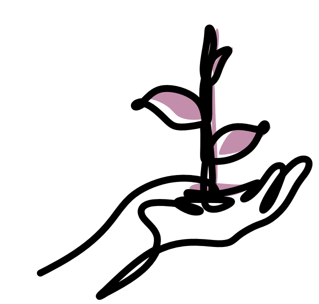
We explain every step in plain language. This leads to fewer surprises, better choices, and a plan you actually trust.

One coordinated team working for you

We coordinate with your accountant, lawyer, and other professionals so every piece works together.

Wealth with purpose

We help you use your wealth to protect what matters most to you, whether that’s family, lifestyle or causes—today and for generations.



What Makes Us Different

Depth of discovery

We go beyond balances into money history, values, and family dynamics. The numbers matter—but so do the narratives behind them.

Advocates and problem-solvers

Bring us anything with a dollar sign—tax challenges, cash-flow issues, corporate structures, estate questions. We own the problem, figure it out and help you move forward.

Advice before products, with transparent fees

We have no product bias — our only focus is your success.
Your needs come first. Always.

Fully licensed Certified Financial Planner® professionals

We are portfolio managers licensed in securities and insurance and our team holds industry-leading designations, including CFP®, CFA, and CIM.

Access to experts

Beyond our expertise, we also collaborate with Richardson Wealth's in-house specialists in insurance, philanthropy, tax, and estate planning to deliver comprehensive wealth management solutions tailored to each client's unique needs.

Our Vision

We provide clarity

Empowering clients to meaningful action in their financial lives for generations

Lalli Greco Wealth Management

Asset Managers
Personal and Corporate
Insurance Solutions

You

Richardson Wealth Tax & Estate Planning

Tax & Financial Planning Strategies
Retirement Planning
Business Succession
Estate
Charitable Giving

Your External Advisors

Accountant
Lawyer
Private Banker
Lender

How Life Gets Better

Peace of mind

You will always know where you stand and what's next.

Permission to enjoy

You can say yes to trips, gifts for the grandkids, and early retirement without second-guessing.

Everyone on the same page

Your accountant, lawyer and other professionals all working together toward the same goals.

Confidence in uncertain moments

When markets shift or when life changes—you will know what to do (and what you can ignore).

Who We Help

We serve business owners, incorporated professionals, and families in Victoria, Vancouver Island and across the Lower Mainland who value thoughtful advice and prefer a trusted partner looking at their wealth from all angles.

Business owners

You’ve spent decades building your business. Now you have questions:

When do I step back? How do I take care of the people in my life?

We start by understanding what you want, then use planning and scenario modelling to make decisions simple, timelines clear, and progress visible—so you can focus on the last, best years of ownership and the first, better years that come after.

Incorporated professionals

Your days are full—patients, clients, files—and the financial pieces live in too many places: corporations, trusts, RRSPs, insurance, etc. We gather it all on one page, show you what matters, and help plot a path forward. We tune compensation for tax efficiency, keep investments aligned across accounts, right-size risk, and work with your CPA and lawyer—so your plan works in the background while you get your evenings back.

Families

You’ve reached the part where the numbers are solid and the focus shifts to meaning: protecting the people you care about, setting others up to thrive, and having a positive impact on your community. We build a simple path for income today and an organized estate tomorrow, with steps that reduce tax and remove guesswork. We meet with your family, answer the awkward questions, and develop and implement the plan—so everyone knows what to do, and you can enjoy this season with a lighter mind.

Common Misconceptions
(and The Reality)

"We thought you just pick investments."

Reality: We offer full-picture planning across tax, estate, risk, cash flow and portfolios. Investments support the plan, they are not the whole plan.

"A plan will restrict us."

Reality: Good planning helps you enjoy life today—it frees you to enjoy your wealth without fear of derailing your future.

"We'll figure this out later."

Reality: Waiting costs money and options. Early planning can reduce taxes, raise business value, and give you a smoother handoff—on your timeline, not under pressure.

What You Can Count On

Responsiveness

We reply to every call and email quickly and follow through with clear next steps. You'll always know who's handling it, when you'll hear back, and how we're moving it forward.

Respect

We always show up prepared and on time and do exactly what we say we'll do.

Transparency

We explain plans in plain language so you always know what's happening and why. We also clearly explain fees.

Consistency

We follow a predictable process—regular check-ins, timely updates and anticipating challenges before they arise.

What Happens Next

1. Intro call

We confirm fit, scope, and what a great outcome looks like for you.

2. Discovery & design.

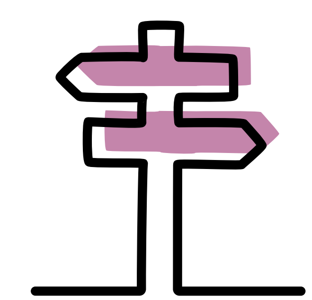
We listen first—then co-design a roadmap tailored to your life, entities, and goals.

3. Coordination & implementation.

We work with your accountant and lawyer to ensure nothing gets missed.

4. Review & adapt.

Life changes; your plan will too. We keep momentum with a simple, scheduled rhythm.



Your Next Step

Ready to reclaim your time and enjoy life now?

Ready to stop worrying about what the future holds?

We'll take all the pieces of your financial world—business, corporations, investments, taxes, estate, insurance—and turn it into one clear, coordinated plan.

The time you spend with us gives you time back.

That's time well invested.

Contact us

Amrit Lalli CFP®, CIM®, B.Comm

Senior Wealth Advisor, Associate Portfolio Manager
Amrit.Lalli@RichardsonWealth.com

Dan Greco CFA, CFP®, B.A. (Hons.)

Senior Wealth Advisor, Associate Portfolio Manager
Dan.Greco@RichardsonWealth.com

Our Office

2950 Jutland Road, Suite 400
Victoria, British Columbia, V8T 5K2

250.655.6961

LalliGrecoWealthManagement@RichardsonWealth.com

RICHARDSON
Wealth

LALLI GRECO
WEALTH MANAGEMENT