

Keeping In Touch

Good Morning:

I am pleased to announce that David MacIver, who joined Stewart Thomas Wealth Management in March 2019, has completed the requirements of IIROC and the Canadian Securities Institute for the designation of Associate Advisor. I have known Dave for 25 years personally and professionally when he worked for Manulife Financial, Fidelity Investments and Dynamic Mutual Funds. His role since joining us has been to work with our team on investment analysis and research, portfolio design and implementation. With the Completion of the designation, I see Dave's role expanding to include more investment advice and client communication in such areas as working with clients for their annual contributions to client's TFSA, RESP and RRSP accounts. Dave is very familiar with all of the client investment portfolios and will continue to work along side me in developing and implementing overall investment strategies, monitoring client portfolios, review meetings with clients and estate and retirement planning for our clients.

The Associate Advisor Designation provides the ability for us to expand our communications and contact with all of our clients. Dave and I have an identical approach to investment philosophies and strategies and work as one on all client portfolios. The Associate Advisor designation allows for Dave to connect directly with clients, take investment confirmations and instructions and place trades which is the same as my Investment Advisor designation. While nothing structurally has changed, this allows for us to be more responsive to our clients needs and provides me with more time to work on the more comprehensive estate, tax and retirement needs for our clients.

Congratulation Dave.

Take care

Trevor – Investment Advisor

Dave – Associate Advisor

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