

Our Integrated Wealth Management Approach

We provide tailored financial strategies for select individuals, their families, and owners of small to mid-sized corporations, and incorporated professionals.

We work with you and your extended circle of advisors to identify opportunities, discuss options, develop a tailored strategy, and implement an action plan with a seamless service approach.

We understand the time constraints and service expectations of sophisticated clients and have built a team of dedicated wealth specialists focused on helping you achieve your goals.

Our clients place a high value on the depth of knowledge our wealth specialist team offers and the trusted advice that we are able to deliver.

Our tailored services include:

Strategic Wealth Planning:

- Comprehensive analysis
- Risk management
- Tax minimization
- Business succession and partnership insurance

Private Investment Services:

- Discretionary portfolio management
- Advisory Services
- Strategies for large concentrated positions and executive options

Private Banking:

- Customized access to leverage
- A dedicated banking team
- Confidential and personalized administrative support

Trust and Fiduciary Services:

- Wealth transfer planning
- Estate and trust management
- Will and estate planning
- Philanthropic advisory services

We look forward to continuing the conversation.

Tel.: 506.447.5629 TOLL FREE 1.888.450-6465

Email: keir.clark@scotiawealth.com

Website: www.keirclark.ca



Enriched Thinking™



Introducing our Scotia wealth specialists



Keir Clark, FCSI, FICB, CIM, PFP
Portfolio Manager and Director, Wealth Management

With more than 30 years working in the industry through both great and terrible markets, Keir's clients are accustomed to receiving level headed and appropriate advice in all circumstances. Although he has developed a solid understanding of all financial matters, he specializes in helping clients make sure they achieve their goals within the risk they are willing to take; that their estate passes to the people they want; and that they enjoy peace of mind along the way.



Colin Hicks B.Comm, CFP
Associate Director, Scotia Wealth Insurance Services Inc.

Colin joined ScotiaMcLeod in January 2000 bringing with him years of experience in the estate planning and financial services industry, including experience in comprehensive life, pension, and distributor support. Prior to joining ScotiaMcLeod, Colin was an independent insurance professional and a specialist in the group and pension benefits area of one of Canada's leading insurance companies. Colin performs a complete analysis of your objectives and audits your current coverage to develop strategic insurance-based solutions to meet your short-term and long-term goals, and demonstrate how these solutions can enhance your overall financial strategy.



Dean Gibbons, CLU, FMA, FCSI, Ch. P.
Senior Financial Planning Consultant, Scotia Capital Inc.

Dean has extensive experience providing financial planning advice to clients with complex and sophisticated needs and goals. He draws on the breadth of expertise that he has developed over his 10 years in the financial sector. Dean is a graduate of the Bachelor of Arts program at the University of New Brunswick. He holds the Financial Management Advisor designation from the Canadian Securities Institute, the Fellow of the Canadian Securities Institute designation and is currently working towards the Chartered Life Underwriter designation.



Bernadette Knowles
Private Banker, The Bank of Nova Scotia

Bernadette has been in the financial service industry since 1991. She has worked in various roles within the Corporate and Syndicated Loans department dealing with a diverse group of corporate clients from various sectors. For the past 15 years Bernadette has been in Commercial Banking working with Mid-Size Corporations in New Brunswick and Prince Edward Island. As your Private Banker, Bernadette will provide credit solutions to ensure your financial goals are aligned with your personal goals and objectives.