CIBC PRIVATE WEALTH
WOOD GUNDY

THE DANIELS INVESTMENT GROUP

The Daniels Investment Group
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Welcome to The Daniels Investment Group

Investment Planning

- Goals
- Risk tolerance
- Financial position
- Income needs

Retirement Planning

- Retirement projections
- Tax efficient income streams
- Creditor proofing
- Individual pension plans

What Sets Us Apart

Insurance Needs

- Estate equalization
- Estate taxes
- Income replacement
- Buy/sell agreements
- Policy reviews

Estate Planning

- Wills, power of attorney
- Corp executor - CIBC Trust
- Corporate purification
- Estate freeze
- U.S. estate tax

Tax Planning

Meet our team

Client care is the highest mission of The Daniels Investment Group. We counsel affluent individuals, professionals, and business owners on all aspects of their personal finances, including investments, financial and estate planning, as well as insurance needs.

Dudley Daniels, CPA, CA, CIM
Senior Wealth Advisor, Portfolio Manager
(306) 975-3812 | dudley.daniels@cibc.com

Dudley partners with people who care about their money and earn their trust by providing a reasoned, tax effective process to grow and protect their assets. As a Chartered Accountant, a Wealth Advisor with more than 35 years' experience, and a business owner himself, Dudley understands clients' investments needs and concerns. His background allows him to liaison with external advisors to provide a comprehensive investment, retirement and estate plan structured to meet clients' goals.

Colton Daniels, CPA, CA
Wealth Advisor
(306) 385-2125 | colton.daniels@cibc.com

Colton is a second generation Chartered Accountant in the Daniels family, and the first legacy advisor to have joined The Daniels Investment Group after graduating from the University of Saskatchewan and spending years working for accounting firms in both Saskatoon and Red Deer. He is able to develop strong relationships with clients and works closely with them to provide tailored investment strategies and solutions to get them to their goals. A strong financial background makes Colton the best of both worlds, providing investment advice and tax minimization strategies to clients.

Bryce Daniels, BA, B. Comm
Investment Advisor
(639) 220-0193 | bryce.daniels@cibc.com

Bryce is the second legacy advisor of The Daniels Investment Group. After graduating from the University of Saskatchewan with both BA and B. Comm degrees, he headed west to Calgary where he lived for over a decade doing business development roles in various industries. Relationships and client success have been the cornerstone of Bryce's career and led him back to Saskatoon where he continues reaching out to clients and others to help them achieve what they desire most through The Daniels Investment Group's unique offering of investment and financial planning services.

Melissa Janis, B. Comm
Financial Associate
(306) 975-3808 | melissa.janis@cibc.com

Melissa is the second longest serving member of The Daniels Investment Group coming to work after graduating from the University of Saskatchewan with a B. Comm in finance. She is the glue that holds the team together and is the initial point of contact for most clients. Her enthusiasm, professionalism and attention to detail ensure that clients' questions are efficiently dealt with, either by herself or by the most qualified team member.

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