Susan MacQuarrie, PFP
Senior Wealth Advisor
CIBC Wood Gundy

Tel: 902 420-2707
susan.macquarrie@cibc.com
https://woodgundyadvisors.cibc.com/Susan-Macquarrie

Personal Profile

I have over 25 years experience in the financial services industry and am passionate about my career. As a Wealth Advisor I go above and beyond to understand my clients' financial goals and dreams. I grew up in a small town on the beautiful Bay of Fundy. From a very young age I was interested in finance and at age eleven I wrote a letter to then Prime Minister, Pierre Trudeau, asking about the economy. He promptly wrote back and signed the letter in ink. My parents taught me that, 'giving was living', and I have never stopped giving back to my community. I have two beautiful children, Connor and Chloe, who have become wonderful assets to the world. They make me proud every day.

My investment philosophy

My investment philosophy is holistic and comprehensive. I understand that wealth is more than just money and assist my clients in building a solid foundation for their financial future and overall well-being. With my deep understanding of the complexities of wealth management, I provide expert guidance and tailor made solutions designed to maximize their financial potential. My holistic approach is comprehensive and includes investment management, financial planning, debt management, estate and will planning, trusts, tax planning and insurance planning. With my expertise, integrity and genuine concern I can help you and your family achieve lasting wealth and security. In a world where trust and care are paramount, I stand out as someone who goes above and beyond to make a positive impact on my clients' lives.

Wealth Partners / Specialists

As a Senior Wealth Advisor, I work closely with many partners. Here, at CIBC Wood Gundy, we have access to Financial Planner's, Estate and Trust Planning Specialist's, and Insurance Specialist's to help protect your wealth. There is also access to Private Banking to help you with your day-to-day banking needs. They are all here to give you professional advice at no cost to you as a client.

Products and services

- Professional investment management services
- Estate planning services through our specialist
- Investment trusts
- Retirement planning
- Financial planning services through our specialist
- Insurance services
- Segregated Funds
- Fee-based accounts

Our integrated wealth management approach

At CIBC Private Wealth, every element of our integrated wealth management approach is designed to support your goals. Our integrated approach is built around four key pillars. It all starts with understanding you and your goals, which are supported by our customized services and expert guidance to keep you moving forward. In addition to flexible investment solutions, we offer tailored banking and trust services, strategies to safeguard your wealth and transition planning when you need it.