Highly Specialized Services For Select Clientele

At CIBC, we recognize that individuals with significant wealth tend to have more complex situations that require a more holistic approach to financial planning. In fact, these individuals often need solutions that go beyond the scope of traditional investment services; solutions involving the expertise of individuals from a wide range of specialties. It's not often that you'll find such experts under one roof… unless you're a CIBC Wood Gundy client.

Through CIBC Wealth Advisory Services, you will benefit from an approach that integrates all facets of wealth management into a cohesive plan that considers your entire financial picture and provides actionable recommendations, most often in the areas of tax planning, estate planning, business transition planning and philanthropy.

As your Investment Advisor, I am the conduit to CIBC Wealth Advisory Services and your CIBC dealings. By engaging a CIBC Wealth Advisor, we can work together with your accountant, lawyer, and any other trusted advisors to create a robust financial plan that reflects your priorities and focuses on helping you achieve the goals you have set for yourself, your family, your business, and your future.