

We are pleased to announce that we have added more resources in each of the following areas of our practice to better serve you in 2017.

Portfolio Management

Linda will remain as Portfolio Manager and continue to chair our investment committee. We also have Jason Castelli, CFA and Andrew Clee, CFA from the Raymond James portfolio management group who contribute to our weekly meetings and provide us with research on North American equities, mutual funds and ETFs.

Jason has over 16 years in the banking and retail brokerage business. Prior to joining Raymond James, Jason spent five years at CIBC Wood Gundy as senior manager, U.S. equities and Canadian preferred share specialist. Jason was a key member of CIBC Wood Gundy's Investment Strategy Committee which oversaw assets of over \$400 million across multiple fee-based platforms. In addition, Jason spent 10 years at HSBC Securities covering North American and international securities.

Andrew has held a number of different positions at Raymond James Ltd. since joining the organization in 2012. In his current role as mutual fund/ETF specialist, Andrew is responsible for performing research and due diligence on mutual funds and ETFs. Previously, Andrew traded currencies as a foreign exchange specialist and performed macro and equity research as a research associate. He earned his Bachelor of Commerce degree from the University of Guelph with a specialization in management economics and finance, and holds the Chartered Financial Analyst® (CFA) designation.

Estate, Tax and Financial Planning

David will continue to lead this action group which now includes Steve Macdonald, CLU®, CFP®, FMA, EPC, FLMI and Vince Murton, CFP®, CLU® who will be assisting in the preparation of comprehensive tax, estate, and financial plans for our clients.

Before joining Raymond James in December of 2014, Vince worked as a financial planner with another national investment firm, assisting affluent clients with similar planning strategies. In particular, Vince has extensive experience working with business owners to help them structure and plan their retirement, as well as plan and understand their eventual exit strategies.

Steve McDonald is a chartered life underwriter (CLU®) and a certified financial planner who brings over 20 years of experience in financial planning, tax, insurance, estate and retirement planning. Steve is a Fellow of the Life Management Institute. Steve has held senior management positions in the life insurance and wealth management industries. His extensive experience includes insurance, structured settlements and annuities, investment and pension fund products, as well as integrated planning focused on tax minimization. He also brings a highly developed expertise in dealing with bank-leveraged financing programs.

Tax Services

We are now able to offer tax filing services for a broad range of clients depending on the complexity of their needs. We will be discussing this with you on an individual basis to see how we can assist you in this important area of your personal finances.

The Angas Shick Group Private Wealth Counsel is a Financial Advisory group with Raymond James Ltd. The views of the author do not necessarily reflect those of Raymond James. This commentary is for information only. Raymond James Ltd., Member - Canadian Investor Protection Fund.