

# CALGARY WEALTH MANAGEMENT SERVICES TEAM

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There's Wealth in Our Approach.™



**RBC Wealth Management**  
Dominion Securities

In addition to investing and money management, RBC Dominion Securities offers assistance with financial planning, insurance strategies, and Wills and estates. With our vast network of leading professionals, we'll provide you with the unique, comprehensive and fully integrated solutions to help answer your questions.



**COADY CORMIER, BBA (FINANCE), LLB, TEP | Vice President, High-Net-Worth Planning Services**

Coady has assisted high-net-worth and ultra-high-net-worth families since 1992. He works closely with your investment advisor to structure your affairs in a manner that addresses your overall wealth planning needs, which you would then discuss and implement with your accountant or lawyer. His expertise includes tax and estate planning for executives, business owners, professionals, retirees and individuals with U.S. issues.



**FAISAL JAMAL, CA | Business Owner Specialist | High-Net-Worth Planning Services**

Faisal is a Chartered Accountant with a BA in economics from the University of Victoria, and a Masters of Professional Accounting from the University of Saskatchewan. Prior to joining RBC, Faisal was a tax senior manager with a mid-size accounting and advisory firm, as well as with a multinational accounting firm. Faisal specializes in tax and estate planning for high-net-worth families. Together with your investment advisor, he helps you explore succession, tax, retirement and estate planning issues you face as a business owner.



**JOHN SIMES, J.D. | Vice President, Will & Estate Consultant**

John attended the University of Manitoba and received a Juris Doctor in 2002. He works closely with your investment advisor to help structure your estate in an efficient and tax-effective manner. Following your meeting, John will provide you with a report outlining various estate planning issues for you to explore in further detail with your own lawyer or accountant.



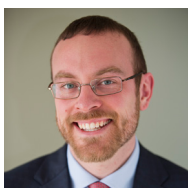
**MIKE MACOUN, CLU, CHS, TEP | Vice President & Estate Planning Specialist**

Working closely with your investment advisor, Mike assesses your wealth management needs and recommends creative, tax-exempt insurance strategies to address them. For complicated situations, he works with your other professional advisors in the development of appropriate solutions. He can focus on both personal and corporate insurance solutions to help increase your net worth, reduce the impact of taxation and secure your wealth.



**NEIL HORNE, B.COMM., CA, CFP | Estate Planning Specialist**

Neil provides insurance solutions for clients in the areas of estate planning, retirement, succession planning, charitable giving and executive compensation. He practiced as a Chartered Accountant (CA) for 15 years, providing tax and accounting services to families and businesses in Alberta. Subsequent to his career as a practicing CA, Neil was the national estate and tax planning consultant with a major insurance company.



**ERIC MILNER, CLU, CHS | Estate Planning Specialist**

Eric is a valuable member of your advisor's team, helping you create, preserve and increase your wealth by incorporating insurance solutions into your comprehensive financial plan. With experience in both personal and corporate insurance planning, Eric is able to provide unique and customized solutions to meet your needs and maximize the financial and tax advantages of insurance products. He focuses on wealth management solutions to manage financial risk, business succession planning and maintaining family harmony, and assist in the realization of philanthropic goals.



**KELLY KOTELLO, B.COMM., CA, CFP | Financial Planning Specialist**

Kelly is a Chartered Accountant (CA) with over 10 years of post-designation experience. She works with and supports your investment advisor in preparing and presenting comprehensive Compass Financial Plans that recommend strategies to maximize your cash flow, reduce taxes, ensure your retirement lifestyle, protect your financial security, transfer wealth tax-efficiently and make the most of your philanthropic legacy.



**MONIKA ZARZYCKI, BBA, CA, CFP | Financial Planning Specialist**

Monika received her Chartered Accountant (CA) designation in 2003. She works with and supports your investment advisor to help address your specific financial, tax, retirement and legacy planning concerns. She provides specific recommendations focused on each client's particular needs, including cash flow, lifestyle protection, insurance, retirement, tax-efficient wealth transfer or estate planning. Her ideas ultimately help maximize each client's situation and achieve their goals.



**DONNA TILDEN, CPA, CA, CFA | Financial Planning Specialist**

Donna is a Chartered Professional Accountant (CPA), Chartered Accountant (CA) and a Chartered Financial Analyst (CFA), and is currently pursuing her Certified Financial Planner designation. She graduated from Wilfrid Laurier University in 1988 with a degree in Business Administration. Donna's role is to work with and support your advisor in preparing and presenting comprehensive Compass Financial Plans.



**JEFF UNRUH, CFP, CMA, CLU, B.COMM. | Financial Planning Consultant**

Jeff has been providing tax and financial planning services for both individuals and business owners since 2000. As a Certified Financial Planner (CFP) and a Certified Management Accountant (CMA), Jeff focuses on understanding your current financial situation and objectives in order to identify strategies to help you achieve your life goals.



**JASON FONG, B.COMM., CA | Financial Planning Specialist**

Jason is a Chartered Accountant (CA). He holds a Bachelor of Commerce degree from the University of British Columbia and has completed all three levels of the Canadian Institute of Chartered Accounts' In-Depth Tax Course. Coming from one of the major global accounting firms, Jason brings a broad range of experience to his role. In his previous role, his work included tax minimization through appropriate tax planning (corporate and personal) and business restructuring. Jason's client base included high-net-worth individuals, private companies, trusts and partnerships.



**SHAUNA GLEMSIER, B.COMM. | Financial Planning Specialist**

Prior to joining RBC, Shauna was employed as a tax manager at one of the largest multi national public accounting firms where she specialized in accounting, tax planning and compliance for individuals, owner-managed and corporate clients. She received her Bachelor of Commerce (major accounting; minor finance) from the University of Alberta, and has completed Levels 1 and 2 of the CICA's In-depth Tax Course. Shauna's primary role is to work together with the advisors in preparing and presenting comprehensive Compass Financial Plans.



**NANCY MATTSON, PFP | Estate and Trust Advisor**

With more than 20 years of industry experience, Nancy brings to each client the necessary skillset to provide both the technical expertise as well as the genuine understanding of the emotional complexities that underlie these issues. A graduate of Mount Royal University, Nancy has continued to deepen her knowledge and expertise by receiving her Personal Financial Planner (PFP) designation and by completing the Canadian Securities Course. Nancy works with individuals, families and businesses to provide customized estate, trust and incapacity solutions. Whether it is helping someone to settle an estate, establishing a trust to ensure the successful transfer of family assets, or arranging to assist with the administration and responsibilities for a Power of Attorney, Nancy can help.

*Thank you for your interest in wealth management at RBC Dominion Securities. For more information about our Wealth Management Services Team, please contact:*

**TOBY DRAGLAND**

Vice-President

& Assistant Branch Manager

403-355-2358

[toby.dragland@rbc.com](mailto:toby.dragland@rbc.com)



**RBC Wealth Management**  
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Professional Wealth Management Since 1901.