RBC DOMINION SECURITIES INC.

Calgary Wealth Management Services Team

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.

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, RHU

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.

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RBC Wealth Management
Dominion Securities

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 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.

Kelly Kotello, b.comm., ca
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
Financial Planning Specialist

Prior to joining RBC, Monika was employed as a tax manager at one of Canada's largest public accounting firms where she specialized in accounting, tax planning and compliance services for individuals, owner-managed and corporate clients. Monika's primary role at RBC is to work together with advisors in preparing and presenting comprehensive Compass Financial Plans.

Jeff Unruh, cfp, cma
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.

Thank you for your interest in wealth management at RBC Dominion Securities. For more information about our Wealth Management Services Team, please contact Vice President & Assistant Branch Manager Toby Dragland at 403-355-2358 or toby.dragland@rbc.com.