JASON LEWIS, BBA
Estate Planning Specialist
RBC Dominion Securities

Introducing Jason Lewis
Estate Planning Specialist

Jason Lewis, BBA, is a valuable member of your IA's team, helping you create and preserve your wealth.

Jason employs a comprehensive process to assess client needs and then recommends creative, tax-exempt insurance products that will help them achieve their wealth management objectives. For more complicated situations, Jason will partner with your other professional advisors in the development of appropriate solutions.

Jason can focus on both personal and corporate insurance solutions to help increase your net worth and reduce the impact of taxation. Jason can also ensure your wealth is transferred to your heirs in accordance with your wishes. To help in this endeavour, Jason has access to insurance solutions from the top-ranked insurance providers in Canada.

Jasn began his career in the insurance industry in 1996. He is currently pursuing his Certified Financial Planner designation.

To schedule a meeting with Jason, please contact your Investment Advisor.

Professional Wealth Management Since 1901

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