MONTGOMERY OUIMET ASSET MANAGEMENT OF RBC DOMINION SECURITIES

Wealth Management
Dominion Securities

WHAT WE DO

At Montgomery Ouimet Asset Management our purpose is to ensure that your family is best positioned to achieve your aspirational goals, using the resources of a premier global investment firm, while delivering the personalized touch of a family office.

Located in Ottawa, Ontario our team manages $420 Million in custodied assets from across North America. We particularly specialize in helping people in the Food & Beverage Industry. Every member of our client families receives unrivalled service from the partners of our group. Our priority is to preserve and grow our client's capital while concentrating on their objectives and current needs.

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WHAT MAKES US TICK

Inquisitiveness

We ask a lot of questions. We're quite nosy. We want to know what makes you tick, and we need to know everything that will help us to understand you. You might think us to be a bit meddlesome. Hopefully that's okay with you. As long as we make informed recommendations!

·Simple First, Brilliant Later

We start with the simple things, rather than trying to beguile you with all sorts of charts and graphs. We can get to the complex later, linking up with our firm's strategists and in-house experts in the areas of tax planning, estate and trust plans, corporate structure, adequate insurance, banking solutions and intergenerational wealth transfer. Our portfolios and financial plans are only a guide though. We make sure you stay on track so that our recommendations make your goals attainable.

We Adapt to You

Over the decades, we've become quite savvy and proficient at working with all of the individuals within our client-families. We pick up on the nuance of your own personal relationship with money, matching your values and goals to your investments, to achieve the best outcome. Our ability to recognize and respect the uniqueness and individuality of our clients is what has allowed us to assist many of them continuously since 1990.

MEET OUR TEAM

To find out how our team all came together, read our backstory

Brian Montgomery, FCSI, CIM

Vice President & Portfolio Manager

In 1990 Brian joined Richard Greenshields of Canada as a private client investment advisor in Ottawa and in the fall of 1996 the firm was purchased by RBC Dominion Securities. Brian is a licensed Portfolio Manager in both Canada the United States.

Chris Ouimet, CFA, CFP

Portfolio Manager

In 2009 Chris joined Scotia Cassels) and worked exclusively with High Net worth investors as a relationship manager and portfolio manager. In January 2019, Chris partnered with Brian Montgomery at RBC Dominion Securities. Chris is a licensed Portfolio Manager.

Olivia Jackson. FMA

Associate Advisor

Olivia joined Montgomery Asset Management in October 2012. Olivia is responsible for all of our trading activities and portfolio modeling, and provides exceptional service to our clients.

Krista Brown, B.Comm Finance

Associate

Krista joined Montgomery Asset Management in August 2013. Krista is responsible for all client administration and communications. She also coordinates all of our marketing and client events .

WHO WE SERVE

We have clients right across the nation, in every province.

We also have many US and Internationally-domiciled clients.

We deal with a lot of business owners, medical professionals, lawyers, accountants, professional athletes and entertainers.

Through Brian's involvement in the restaurant industry we also deal with many food and beverage business owners, suppliers, and related professionals.

While our clients may be diverse in terms of occupation and geography, they still have commonalities. They like to spend money on family, travel, and experiences. They have saved and sacrificed along the way and are concerned with making sure they have enough money till the end of their retirement.

Ultimately, most clients just want their money to be invested and managed in a responsible manner, while leaving enough for a lasting family legacy.

OUR PROCESS

1) Initial Meeting

Informal introduction - we get to know you and you us.

2) myGPS Discovery Meeting

In this meeting we will ask you about your most pressing financial issues, changes to your family situation or dynamic, and the impact on current financial and estate plans

3) Recommendations Meeting

We will walk you through your personal myGPS and your Investment Management proposal.

4) Account Opening

We will prepare all the necessary paperwork and take care of everything needed to transfer and open your registered and non-registered accounts. Your assets may be transferred in cash or in-kind.

5) Wealth Management Implementation

Depending on the complexity of your situation, we will initiate meetings with RBC and external partners including Private Banking, Will & Estate Planning, Trust Services and Financial Planning.

6) Ongoing Reviews and Client Events

We will aim to connect with you at least once per quarter over the phone to make sure that all of your needs are being met. We want to be able to capture and reflect any changes in your life that may impact our ongoing advice to you.

CHECK US OUT

Montgomery Ouimet Asset Management

www.montgomeryouimetassetmanagement.com

Book an initial meeting: 613 566 3566

Brian Montgomery

Christopher Ouimet