DONALD D. BELL
B.A., LL.B., CFP, R.F.P., TEP
Will & Estate Consultant
Wealth Management Services

Introducing Donald Bell Will & Estate Consultant

A graduate of the University of Winnipeg, Donald Bell received his Bachelor of Laws degree from the University of Manitoba, and was called to the Manitoba Bar in 1984. Donald is a practicing member of the Law Society of Manitoba and has also earned the Registered Financial Planner (R.F.P.), Chartered Financial Planner, Certified Financial Planner (CFP), and Trust and Estate Practitioner (TEP) designations.

Donald Bell is a lawyer who has held senior positions with several investment and life insurance companies. He has extensive experience from both the head office and field perspective in the areas of wills, estates, taxation, insurance, financial and retirement planning. Donald provides analysis and development of advanced estate, tax, insurance and wealth planning strategies for high net worth clients, working in conjunction with their advisors.

Donald is a member of the Society of Trust and Estate Practitioners (STEP), the Institute of Advanced Financial Planners and the Financial Planners Standards Council (FPSC). He has taught regularly for the CSI Global Education Inc. (formerly known as the Institute of Canadian Bankers) on various planning and compliance matters. He has spoken at many industry gatherings including the Strategy Institute and the C.A.F.P. Annual Conventions on investment, estate, financial planning, and insurance matters. In addition, he has spoken at numerous public seminars on these topics.

Donald is also very active in his community where he is involved with a number of charitable organizations.

COMPLIMENTARY WILL AND ESTATE PLANNING CONSULTATION

In appreciation of your valued business relationship with us, your advisor is pleased to offer you a comprehensive Will and estate consultation with Donald. Our comprehensive approach addresses any issues and concerns you may have, and helps you to clarify your objectives. Following your consultation, you will receive a report outlining various estate-planning opportunities for you to explore in further detail with your own lawyer or accountant.

To schedule a meeting with Donald Bell, please contact your advisor.