Wealth Management
Dominion Securities

Joseph T. Sardo, BA, CIM, CFP
Senior Portfolio Manager &
Wealth Advisor
905-546-5828
joe.sardo@rbc.com

Wesley Smith, B.Comm., CIM, CFP
Associate Investment Advisor &
Financial Planner
905-546-5004
wesley.smith@rbc.com

Kimberlee Parker
Associate
905-546-5812
kimberlee.parker@rbc.com

Michelle Gaskell
Associate
905-546-5990
michelle.gaskell@rbc.com

RBC Dominion Securities
100 King St. W., Suite 1500
Hamilton, ON L8P 1A2
www.joesardo.com

Joseph T. Sardo, BA, CIM, CFP
Senior Portfolio Manager & Wealth Advisor

Joe graduated from the University of Hawaii in 1991 with a degree in communications. In his final year, Joe was drafted by the Ottawa Roughriders Football Club and went on to complete his football career with the Toronto Argonauts. In 1995, he retired from football and took on the challenge of being an Investment Advisor. Thanks to his sports background, Joe has a deep understanding of teamwork and communication. He is strongly committed to providing his clients with quality service and advice.

Joe has earned two of the industry's highest designations, Certified Financial Planner (CFP) and Canadian Investment Manager (CIM). Also a Portfolio Manager with options and insurance licences, he provides a comprehensive approach to portfolio management and estate planning.

In turbulent market conditions, a broad, diversified plan is of paramount importance to any portfolio. Joe and his team are positioned to provide you with the advice and planning necessary to make sense of complex and rapidly changing markets.

Born and raised in Hamilton, Joe is married, has four children and enjoys being active in his community. Joe was the defensive coordinator for the McMaster University football team. He has been the President of the Hamilton Football Association as well as a Learning facilitator and Evaluator for Football Canada to help promote youth football.

Currently, Joe is a member of the Hamilton Estate Planner's Council and has served on the executive committee for Tourism Hamilton. Joe places a high priority on community charities and youth groups, such as the Catholic Youth Organization where he served as a committee member.

Wesley Smith, B.Comm., CIM, CFP
Associate Investment Advisor & Financial Planner

Wes joined RBC Dominion Securities after graduating from the University of Windsor with an Honours Bachelor of Commerce degree in business. He has earned the Chartered Investment Manager (CIM), Financial Management Advisor (FMA) and Certified Financial Planner (CFP) designations, as well as insurance and options licenses.

Priding himself on providing the highest level of service, Wes works closely with Joe to develop customized investment strategies and offer ongoing portfolio management to our clients. His financial planning experience helps us provide a comprehensive range of wealth management services designed to your unique specifications. As past president of the Estate Planners Council of Hamilton, Wes works with our team of specialists to provide guidance and help ensure your objectives and the full scope of your situation are considered as part of your estate plans.

Wes has worked closely with the United Way, chairing the Hamilton RBC Dominion Securities annual campaign for 10 years. He has also served on the board of directors for Wellwood Resource Centre of Hamilton, most recently as Vice-President. Wellwood is a non-profit, community-based organization that provides care programs and peer support to people diagnosed with cancer as well as their families. Originally from Port Elgin, Wes now lives on the Hamilton Mountain with his wife and their three children, where he is often coaching their hockey, soccer or baseball teams.

Kimberlee Parker
Associate

Kimberlee attended the University of Toronto, specializing in math and computers. With over 25 years of experience working at major financial institutions, Kimberlee has a solid background in the financial services industry and client relations. As the team lead for operations and administration, Kim ensures each and every client receives superior service.

Having completed the Canadian Securities Course and the Conduct and Practices Handbook Course, Kim is integral in managing our clients' day to day financial affairs, administrative matters, requests for information, and more.

Born and raised in Hamilton, Kim enjoys spending time with her daughter.

Michelle Gaskell
Associate

Michelle plays a key role with the administration of client requests and documentation. As the wealth management and client service coordinator for our team, Michelle also provides ongoing communication personalized to each client's specific needs. Michelle attended the Toronto School of Business in Hamilton, Ontario and has over 25 years of experience in the financial services industry. She has been with RBC for over 15 years.

Michelle lives in Waterdown and enjoys camping and spending time with her family in her free time.

Extended wealth management services team

Will & Estate Consultants

Our specialist works closely with us to provide you with information on structuring your estate in an efficient and tax-effective manner. We will provide you with a report outlining various estate planning solutions for you to explore with your own lawyer or accountant.

Financial Planning Specialists

At RBC, we recognize that with greater financial resources comes greater financial complexity. To help you properly coordinate your financial matters and optimize the unique opportunities available to you, we are pleased to offer you our highest level of financial planning.

Personally prepared by a Financial Planning Specialist, your comprehensive financial plan will provide recommendations specific to your situation. Your plan will consider strategies to maximize your cash flow, reduce taxes, ensure your retirement lifestyle, protect your financial security, transfer wealth to next generation tax-efficiently and make the most of your philanthropic legacy.

Insurance Consultants

Our Insurance Consultants employ a comprehensive process to assess your needs and recommend creative, tax-exempt insurance strategies that will help you achieve you wealth management objectives. For more complicated situations, we will partner with your other professional advisors in the development of appropriate solutions.

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