Our wealth management team

RBC Dominion Securities | Fredericton Branch

Investment management is just one key component of a well-rounded wealth management plan. In addition to investing and money management, your advisor offers assistance with financial planning, insurance strategies, Wills and estates and more through a specialized team of highly qualified professionals. It's just one of the benefits of choosing Canada's leading wealth management provider, RBC Dominion Securities.

Nathalie Wybouw, CPA, CA, CFP

Financial Planning Specialist | RBC Wealth Management Services

Nathalie is a Chartered Professional Accountant (CPA, CA) and has completed the Chartered Professional Accountants of Canada's In-Depth Tax Course. She has a Bachelor of Business Administration degree (with a major in finance), a Certificate in Accounting and a Master of Project Management degree. She has also obtained the Certified Financial Planner (CFP) designation. Prior to joining RBC, Nathalie was a manager at a large public accounting firm. She specialized in providing tax compliance and tax planning services to individuals, families and organizations.

Mona-Lisa Lavallée, CPA, CA

Financial Planning Specialist | RBC Wealth Management Services

Mona-Lisa is a Chartered Professional Accountant (CPA, CA) and has a Bachelor of Business Administration degree (with a major in accounting) from the Université de Moncton. Mona-Lisa has also completed the Chartered Professional Accountants of Canada's In-Depth Tax Course.

Prior to joining RBC, Mona-Lisa was employed as a tax manager at one of the world's leading accounting firms. She specialized in providing personal, corporate and estate planning services to high-net-worth individuals, families and organizations.

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Wealth Management
Dominion Securities

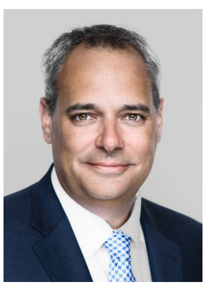
Sharon L. Avery, BPR, LL.B

Will & Estate Consultant | RBC Wealth Management Services

Sharon obtained a Community Services Diploma, a Bachelor of Public Relations degree from Mount Saint Vincent University and a Bachelor of Laws degree from Dalhousie University. Prior to joining RBC Wealth Management, Sharon worked in private practice with a large regional firm and practiced primarily in the areas of corporate commercial law, Wills, estates and trust, health law and medical defence.

Before pursuing her law degree, Sharon spent over ten years in senior executive and management roles within the not-for-profit sector focusing on poverty, disability and healthcare issues. She is a member of the Nova Scotia Bar Society and the Canadian Bar Association. Sharon has served as a director on several national and provincial professional and charity boards. She currently serves on the Board of Governors of Mount Saint Vincent University and is Chair of the University's Advancement and External Relations Committee.

Sharon provides estate planning consultation in areas such as Wills, trusts, taxation of estates, corporate succession planning, cross-border issues, planning for disabled beneficiaries and charitable giving.



Jason Lewis, BBA

Estate Planning Specialist | RBC Wealth Management Financial Services

Jason is an integral member of the team, helping to create, preserve and increase wealth by incorporating insurance-based solutions within comprehensive financial plans.

Specializing in estate planning, Jason applies innovative and tax-efficient solutions to a variety of wealth management issues and is skilled at simplifying their complexities. His individualized approach to personal and corporate insurance planning helps clients achieve their wealth management objectives and reach their estate and financial goals.

Beginning his financial services career in 1996, Jason joined RBC in 2006. Beforehand, he spent 10 years with a leading life insurer, focused on providing insurance solutions expertise to advisors and their teams.