The Elder Team

BMO Private Wealth

Our team

Vance Elder
Senior Investment Advisor
Tel.: 403-750-0893
vance.elder@nbpcd.com

Vance has built a comprehensive wealth management practice and has been providing investment advice to clients for over 25 years. He is a member of BMO Nesbitt Burns' National Investment Advisory Council, providing his direct input to the leadership of the Firm. He has been a regular recipient of awards recognizing one of the top businesses at BMO Nesbitt Burns, awarded to Advisors for the highest quality client service and business management. His educational background includes a degree in Economics and Management from the University of Calgary. Vance has been a member of the Planned Giving Committee for Woods Homes and supports the Canadian Cancer Society, Inn from the Cold, and the CNIB. Outside of work Vance enjoys pursuing his passion for travel, and staying fit and active with his family.

Lori An, CFP, FCSI
Senior Investment Associate & Financial Planner
Tel.: 403-261-9576
lori.an@nbpcd.com

With over 25 years in the Financial Services industry, Lori has comprehensive experience as an Investment Advisor and Financial Planner. She has earned the trust and confidence of her clients through a highly personalized and dynamic approach to wealth management. Lori holds both the Certified Financial Planner (CFP) designation – the gold standard for financial planning, as well as the prestigious designation as a Fellow of the Canadian Securities Institute (FCSI), the highest honor in Canadian financial services. She is an alumni of the University of Lethbridge with a Bachelor of Management degree. Lori's breadth of experience, expertise and credentials help ensure sound advice, expert execution and peace of mind for our clients who require detailed solutions for their complex wealth management needs.

Patty Trimble
Senior Client Service Associate
Tel.: 403-750-0871
patty.trimble@nbpcd.com

A seasoned and experienced professional, Patty brings over 25 years of experience in the financial services industry specializing in client relationships, administration and financial planning. She is well on her way to completing a new designation; Certified International Wealth Manager. Patty enjoys spending time with her family, and in her spare time she loves competing in triathlons, particularly Escape From Alcatraz, and has completed 5 out of the 6 World Major Marathons, leaving Tokyo to round out her goal of completing all 6.

Connor Standring

Client Service Associate
Tel: 403-750-0895
connor.standring@nbpcd.com

Connor joined BMO Nesbitt Burns in late 2021. He started his career in Wealth Management at a competitor's firm shortly after graduating from the University of Calgary with a Bachelor of Economics. Connor is a dedicated professional and is a licensed representative with IIROC. His primary responsibilities include client onboarding, account management and reporting, as well as general portfolio maintenance. Connor has a strong passion for capital markets, and is experienced in executing trade orders, daily reconciliation, and construction of investment models. In addition to delivering superior client service, Connor is a key point of contact for clients and provides operational support with ad hoc requests. Outside of the office, Connor is an avid cyclist who enjoys being outdoors and staying active.

Tracy Bridarolli

Client Service Assistant
Tel: 403-261-9530
tracy.bridarolli@nbpcd.com

The newest member of the Elder Team, Tracy was raised on a farm north of Edmonton, but Calgary has now been home for over 30 years. Tracy and her husband have been married for over 28 years with two adult daughters who are both pursuing careers in Healthcare. With a diverse background in the automotive, oil & gas, and real estate industry, Tracy is a valuable member of the Elder Team's client service team.

BMO Private Wealth

The ELDER Team

BMO Nesbitt Burns

PCD18283