

Marceau Lalonde Gauthier Wealth Advisory/ Gestion de patrimoine BMO Nesbitt Burns



Simple

- Direct ownership of securities via individually customized portfolios (stock, bonds, preferred shares, ETFs, GICs, Convertible Debentures)
- Flat all inclusive fee based on account size and asset mix. Minimum account size of \$500,000
- Direct personalized service by the people making investment decisions and recommendations for your future
- Ongoing collection of dividends for reinvestment or transfer to your bank account as a source of recurring income
- Consolidated tax reporting package
- Access to cash transfers to your bank account with a simple phone call

Transparent

- Full disclosure of fees on your monthly statement
- Consolidated performance summary reports available monthly

Cost Effective

- Fee is tax deductible for non-registered portion of portfolios
- Benefit from preferred Canada/U.S. exchange rate on currency purchase and sale
- Integrated full banking privileges included for relationships over \$500,000. Seamless integration of banking functionality with your investment accounts
- Comprehensive retirement and estate planning analysis and review included
- Asset based lending with a preferred client rate

Tax Efficient

- Tax efficient asset allocation across various accounts to take advantage of differentiated taxation rules for non-registered, corporate, retirement trust and TFSA accounts.

Fees

- Fees includes: advice, trading charges, regular reporting of dividends, internet access to research and annual consolidated tax reporting.

Let's connect

Marceau Lalonde Gauthier
Wealth Advisory/
Gestion de patrimoine

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Troy Lalonde

Portfolio Manager,
Investment Advisor

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Troy has enjoyed working in the investment industry since graduating in 1993. Troy has extensive experience in private client and institutional banking, as well as, venture capital and merchant banking activities. As a Portfolio Manager, he offers clients the simplicity and convenience of discretionary portfolio management.

Troy has held positions including CEO, Executive VP, President, Director, and Founder of TSX and TSX Venture listed companies. Born and raised in Cornwall, he is an active sportsman through the different seasons. Troy is proud of his ongoing support with local charities and events that enhance our community.

Languages: English, French



Francois Marceau

Vice President,
Wealth Advisor

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Francois has worked as an Investment Advisor at BMO Nesbitt Burns since 1999. Prior to that, he worked in public and private accounting for 10 years. He holds the following designations: Professional Financial Planning, Financial Management Advisor and Fellow of the Canadian Securities Institute. Frank believes in a holistic approach to investment planning to better serve the needs of his clients.

Specialties: Investment Management / Asset Allocation Management
Financial Planning
Tax Efficiency Planning
Retirement Planning
Estate Planning

Languages: English, French



Martin Gauthier

Investment Advisor

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Martin has 25 years of expertise in the financial industry. He joined BMO Nesbitt Burns in 2002 as Investment Advisor. Prior to that, he worked as a Financial Planner in a major Canadian bank.

He holds the following designations: CIM® registered trademark (MD) (Chartered Investment Manager) and is also a CERTIFIED FINANCIAL PLANNER® professional.

Integrity, honesty, professionalism and trust represent his core values, integral to a positive and successful client relationship.

My BMO Nesbitt Burns office is located at 280 Main Street East, Hawkesbury, ON K6A 2R4.

Languages: English, French