

Sharman McLean

Wealth Advisory Group

BMO Nesbitt Burns



Dear clients and supporters,

“What’s in a name”?

Henceforth the Robert Sharman Wealth Advisory Group will now be known as the Sharman McLean Wealth Advisory Group.

Cameron McLean, who joined our merry band just over 9 years ago has **earned** – in every sense of the word - the opportunity to become a partner.

From the very beginning the goal was for Cameron to be my designated successor. While I am not planning to retire in the near future, it is important for us to ensure our clients know and understand there is a plan in place to protect future generations’ wealth in the manner as you have become accustomed to.

Cameron is truly a valuable member of our team and even more importantly, to our clients. He is a Wealth Advisor and a Life Insurance Advisor through BMO Estate Insurance Advisory Services Inc. He is active within the community.

His list of accomplishments are too long to fully enumerate here: but here is just a partial list

- Responsible for our team being the number 1 ranked team by BMO Nesbitt Burns for fiscal 2016 based on asset growth – while maintaining 4 key quality metrics the firms set for advisors.
- Becoming the team lead on building our multi-asset multi manager investment proposals.
- Recognized as an expert user on our Financial Software – allowing us to build detailed and robust financial plans
- Taking on more and more responsibility in managing and training the team. Most recently – transferring his knowledge of our financial planning software to Robyn, and our investment planning software to George (and thereby

allowing us to strengthen the depth of our team).

- Asked to speak with Robert at the 2016 BMO Nesbitt Burns Woman’s Investment Advisor National conference
- Annual participant in the BMO Nesbitt Burns “Hockey Helps the Homeless” hockey team.
- A featured speaker at the BMO Financial Group’s career day.
- Co- Captain of the BMO Financial Group’s Ride to Conquer Cancer team, and now part of the Corporate Engagement committee for the event.

He has also proven time and time again that he has the personal character and strength of commitment - traits that are at the core of everything we do.

Cameron and I have become the definition of collaboration. As John Cleese once said: “anything creative should be collaborative.” This has become another key benefit of our team.

From the beginning Cameron began to travel with me to Investment Symposiums. This allowed us to learn together – to discuss and compare notes – to challenge ourselves. We complimented each other, and it was a good example of two heads being better than one. Indeed the Quarterly Review Investment process - which is a key action item we complete for our clients – was built by the both of us.

In many ways this name change does not alter anything of substance. Cameron has already been a partner in action, commitment and accomplishment.

Please join me in congratulating Cameron on making it official.

Best Regards,

Robert Sharman

 Let’s connect

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