Financial Solutions Designed Exclusively for You.

Tucker Willson Group

PROFESSIONAL WEALTH MANAGEMENT

ScotiaMcLeod™

Tucker Willson Group

PROFESSIONAL
WEALTH
MANAGEMENT

Industry-leading financial expertise. An impressive range of investment products and services. A reputation for innovation. A commitment to build long-term relationships. These are the hallmarks of ScotiaMcLeod's success, and explain why we are one of Canada's leading full-service investment firms.

Our Goal

To be your first financial phone call: by using our team of specialists we can help you achieve your specific goals and objectives. We aim to provide you with the best quality service.

Our Philosophy

It is not what you make but what you keep that is important to our team of specialists. We take the long term approach when investing your assets, understanding that since it is hard to grow your wealth we must take great care of its growth and preservation. We feel that with the volatility in the market it pays to focus on the longer term planning aspects of portfolio construction including financial and retirement planning, tax minimization and asset allocation.

Our Motto

We strive to provide superior personalized advice and strong dependable long term service. Our team of specialists will help you design and live the life of your choice by focusing on the accumulation and conservation of your financial resources.

Our Commitment

By following these three things, Our Goal, Philosophy and Motto, we are proud to have become a Chairman's member within ScotiaMcLeod, verifying for us that our clients too have appreciated and acknowledged our commitments as we continue to align their financial resources with their personal aspirations.

Planning Services

The Tucker Willson Group will help you build the long term portfolio you need to reach your personal dreams and goals. Together, we will develop a comprehensive, customized strategy. Then we will put your plan into action, ensuring every decision is right for your financial objectives and risk tolerance. Components of a comprehensive financial plan can include any of the following:

Education Planning:

Given the rising costs of a university education, saving for a child or grandchild's education is often a priority. We can advise you of the most tax efficient vehicles so you can start planning now for the future of your children.

Credit and Lending:

Together with Scotiabank we work to provide you with your own private banker to reflect your individual circumstances and make life much simpler for you.

Retirement Planning:

We know that you don't want to work forever. Many people wonder whether or not the income from their RRSP will be able to sustain them at the level they desire. Together we will help you decide what strategies and vehicles are best to achieve your retirement goals.

Tax Planning:

Tax planning means that you are entitled to arrange your affairs, within the limits of law, so that you pay a minimum amount of tax. By planning throughout the year we can help you save the most money at tax time. Insurance and Estate Planning: We appreciate how important it is to protect your personal investments as well as your family's security. We want to give you the peace mind knowing that your money does what you want when you are gone and that your loved ones will be financially taken care of.

Breadth and Depth of Expertise

Our team of Investment Advisors has over 150 years of financial experience. In addition to numerous academic degrees, our team holds a number of industry specific designations and licensing including Financial Management Advisor, Personal Financial Planner, Canadian Securities Course, Options, Futures and Level II Life Insurance Advisor.

Charles Tucker - Associate Director, Wealth Management

Charles has been providing professional investment advice since 1991. In addition to his practical knowledge of trading and institutional trades, he has a Bachelor of Arts in Economics from McMaster University. Charles' specialities include equity strategies, stock trading, value investing and options.

Peter Willson - Director, Wealth Management

Peter brings to the team experience in the financial services industry since 1993. Along with a Bachelor of Laws and Master of Business Administration both from the University of Western Ontario, Peter specializes in portfolio design, estate planning and tax strategies. His legal education focused on Tax Minimization, adding tremendous value to our financial strategies.

The Tucker Willson Group strives to provide superior personalized advice and strong dependable long term service. Our team of specialists will help you design and live the life of your choice by focusing on the accumulation and conservation of your financial resources.

The Tucker Willson Group

Our team also includes ten other highly qualified and accredited Associates who together bring a wide range of financial experience to our team.

Kevin Carscadden - Wealth Advisor

Kevin graduated from the Ivey School of Business at the University of Western Ontario and has been with ScotiaMcLeod since 1998. Along with his Financial Planning designation through the CSI, he specializes in life, disability and group insurance as well as trading and options.

Investment Associates

Jana Williams - Investment Associate is a University of Waterloo graduate and has been with ScotiaMcLeod since 1997. In addition to 8 years experience in the banking industry, she has her Financial Planning designation through the CSI and is our Estate specialist.

John Kaglik - Investment Associate holds the Financial Management Advisor designation and is a Fellow of the Canadian Securities Institute. After receiving his Masters degree from the University of Manitoba, John joined ScotiaMcLeod in 2000. He now specializes in wealth management solutions through investment management and financial planning.

Gillian Hart - Investment Associate is a York University Economics graduate and is bilingual in French. Working with ScotiaMcLeod since 1996, her experience includes working on the retail bond desk. She now heads up our Group Products division.

Peter Bridgemohan - Investment Associate began his career with ScotiaMcLeod in 1993. With his Financial Planning Designation, Peter focuses on retirement planning and account reviews and specializes in stock trading.

Cori Niosi - Investment Associate has been with ScotiaMcLeod since 1994 after obtaining a BA in Economics. She has over 8 years experience in Group Plans and retirement planning and now focuses on stock trading, institutional clients and high net worth investors.

Shane Dubin - Investment Associate has a business degree in Economics and Finance from York University. Shane stared with ScotiaMcLeod in the spring of 2000 and specializes in trading equities, options and fixed income securities.

Administrative Assistants

Sandra Tavares - Administrative Assistant extraordinaire, joined the Scotia team in 1998 and is the organizational marvel that keeps the team running.

Jacob Coellar - Administrative Assistant is our group administrative specialist. Having started his career with Scotiabank, he joined ScotiaMcLeod in 2007.

Building Relationships for Life

The Tucker Willson Group
Head Office Branch
P.O. Box 402, Scotia Plaza
40 King Street West, 15th Floor,
Toronto, Ontario M5H 3Y2

Tel: 416-863-7505
Fax: 416-863-2847
Toll Free: 1-888-785-4777

ScotiaMcLeod™

400 11465 07/08