

The McClelland Financial Group WEALTHPROFESSIONAL.CA



### Top 50 advisors

| NAME  | COMPANY   | BROKERAGE/DEALER<br>GROUP NAME   | LOCATION  | TOTAL AUM (AS<br>OF OCT. 31, 2014)  | NUMBER OF<br>CLIENTS   | AVERAGE<br>AUM PER<br>CLIENT   | REVENUE<br>CONTRIBUTED  |
|---|---|--|---|---|--|--|---|
| Andrighetti, Susan  | The Andrighetti Group   | CIBC Wood Gundy  | Toronto, Ont.   | \$195 million   | 334  | \$583,832  | \$1,400,000   |
| Batstone, Adam  | Batstone Irwin-Lewis Private Wealth   | ScotiaMcLeod   | Oakville, Ont.  | \$110 million   | 187  | \$588,235  | \$900,000   |
| Ber, Jeff   | Ber Wealth Management   | ScotiaMcLeod   | Calgary, AB   | \$59 million  | 78   | \$756,410  | \$233,000   |
| Birenbaum, Rona   | Caring for Clients  | Queensbury Strategies  | Toronto, Ont.   | \$15 million  | 155  | \$743,870  | \$1,050,000   |
| Bonten, Laurie  | The Bonten Wealth Management Group  | National Bank Financial  | Winnipeg, Man.  | \$113 million   | 194  | \$582,474  | \$1,430,000   |
| Bristow, Diana  | Bristow Financial Group   | Raymond James Ltd.   | Milton, Ont.  | \$40 million  | 96   | \$416,666  | \$400,000   |
| Brothers, Chet  | Brothers & Company Financial  | Lawton Partners  | Regina, Sask.   | \$120 million   | 245  | \$489,796  | \$800,000   |
| Brown, Kate   | Brown Wealth Management Group   | <b>RBC</b> Dominion Securities   | London, Ont.  | \$126 million   | 168  | \$750,000  | \$1,230,660   |
| Brugger, Kirk   | Brugger Wealth Management   | Fund EX  | Brandon, Man.   | \$121 million   | 238  | \$508,403  | \$1,200,000   |
| Chase, AJ   | AJChase PrivateWealth Group   | ScotiaMcLeod   | Hamilton, Ont.  | \$110 million   | 214  | \$514,019  | \$740,000   |
| Daggett, Donald   | Daggett Advisory Group  | CIBC Wood Gundy  | Waterloo, Ont.  | \$53 million  | 56   | \$946,428  | \$600,000   |
| De Goey, John   | BBSL  |  | Toronto, Ont.   | \$72 million  | 94   | \$767,021  | \$611,000   |
| Donahue, Brendan  | Manulife Securities   |  | Invermere, B.C.   | \$145 million   | 415  | \$349,882  | \$696,000   |
| Emond, Don  | Assante Financial Management Ltd.   | Hollis Wealth  | Cobourg, Ont.   | \$93 million  | 300  | \$310,000  | \$1,200,000   |
| Hirani, Shafik  | Shafik Hirani's Private Wealth Managment<br>Practice  | Investors Group  | Calgary, Alta.  | \$200 million   | 607  | \$329,489  | \$4,000,000   |
| Hodgson, Peter  | Hodgson and Associates  | BMO Nesbitt Burns  | Collingwood, Ont.   | \$203 million   | 230  | \$882,608  | \$1,965,100   |
| Hurdman, Fred   | Hurdman & Associates  | Raymond James Ltd.   | Calgary, Alta.  | \$190 million   | 250  | \$760,000  | \$3,000,000   |
| Jackson, Reg  | JMRD Wealth Management Team   | National Bank Financial  | London, Ont.  | \$380 million   | 195  | \$1,948,718  | \$2,250,000   |
| Kim, Gene   | Summit Private Wealth   | Manulife Securities  | Montreal, Que.  | \$70 million  | 125  | \$560,000  | \$750,000   |
| Klein, Wolfgang   | Canaccord Genuity Wealth Management   |  | Toronto, Ont.   | \$106 million   | 207  | \$512,077  | \$250,000   |
| Kratz, Luke   | The Kratz Group   | CIBC Wood Gundy  | Victoria, B.C.  | \$138 million   | 190  | \$728,766  | \$1,281,692   |
| Kronish, Lorne  | Assante Financial Management  | ,  | Montreal, Que.  | \$60 million  | 198  | \$303,030  | \$250,000   |
| Kumar, Pravin   | Pravin Kumar Group  | CIBC Wood Gundy  | Vancouver, B.C.   | \$135 million   | 170  | \$794,117  | \$1,742,000   |
| Lalonde, Sophie   | Delgaty Lalonde Financial Group   | CIBC World Markets   | Montreal, Que.  | \$100 million   | 107  | \$934,579  | \$875,000   |
| Lonsdale, Brian   | Lonsdale Financial Group  | CIBC Wood Gundy  | Ottawa, Ont.  | \$121 million   | 300  | \$403,333  | \$675,000   |
| Luck, Darren  | Luck Financial Group  | CIBC Wood Gundy  | Windsor, Ont.   | \$202 million   | 225  | \$897,777  | \$922,000   |
|   |   |  |   |   |  |  |   |
| McClelland, Robert  | The McClelland Financial Group  | Assante Capital Management   | Thornhill, Ont.   | \$300 million   | 699  | \$430,477  | \$3,401,789   |
| McClelland, Robert<br>Meadows, Ryan   | The McClelland Financial Group<br>CIBC Imperial Service   | Assante Capital Management<br>CIBC Imperial Investors Services   | Thornhill, Ont.<br>Surrey, B.C.   | \$300 million<br>\$147 million  | 699<br>331   |  | \$3,401,789<br>\$847,000  |
|   |   | CIBC Imperial Investors Services   |   | \$147 million   | 331  | \$ 444,108   | \$847,000   |
| Meadows, Ryan   | CIBC Imperial Service   |  | Surrey, B.C.  |   |  | \$ 444,108<br>\$624,240  |   |
| Meadows, Ryan<br>Muir, Eric   | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes   | CIBC Imperial Investors Services<br>Raymond James Ltd.   | Surrey, B.C.<br>Burnaby, B.C.   | \$147 million<br>\$288 million<br>\$56 million  | 331<br>462<br>200  | \$ 444,108<br>\$624,240<br>\$280,000   | \$847,000<br>\$2,200,000<br>\$500,000   |
| Meadows, Ryan<br>Muir, Eric<br>Niblett, Tim   | CIBC Imperial Service<br>Muir Investment Team   | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.   | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.   | \$147 million<br>\$288 million<br>\$56 million<br>\$207 million   | 331<br>462<br>200<br>350   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428  | \$847,000<br>\$2,200,000<br>\$500,000<br>\$2,450,000  |
| Meadows, Ryan<br>Muir, Eric<br>Niblett, Tim<br>Nour, Elie<br>Pereira, Jason   | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.  | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.   | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.  | \$147 million<br>\$288 million<br>\$56 million<br>\$207 million<br>\$170 million  | 331<br>462<br>200<br>350<br>550  | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091   | \$847,000<br>\$2,200,000<br>\$500,000<br>\$2,450,000<br>\$1,600,000   |
| Meadows, Ryan<br>Muir, Eric<br>Niblett, Tim<br>Nour, Elie<br>Pereira, Jason<br>Plaskett, Scott  | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>Ironshield Financial Planning   | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.   | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Toronto, Ont.   | \$147 million<br>\$288 million<br>\$56 million<br>\$207 million<br>\$170 million<br>\$75 million  | 331<br>462<br>200<br>350<br>550<br>181   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365  | \$847,000<br>\$2,200,000<br>\$500,000<br>\$2,450,000<br>\$1,600,000<br>\$1,200,000  |
| Meadows, Ryan<br>Muir, Eric<br>Niblett, Tim<br>Nour, Elie<br>Pereira, Jason<br>Plaskett, Scott<br>Plouffe, Martin-Charles   | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>Ironshield Financial Planning<br>National Bank Financial  | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities  | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.  | \$147 million<br>\$288 million<br>\$56 million<br>\$207 million<br>\$170 million<br>\$75 million<br>\$56 million  | 331<br>462<br>200<br>350<br>550<br>181<br>238  | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294   | \$2,200,000<br>\$500,000<br>\$2,450,000<br>\$1,600,000<br>\$1,200,000<br>\$650,000  |
| Meadows, Ryan<br>Muir, Eric<br>Niblett, Tim<br>Nour, Elie<br>Pereira, Jason<br>Plaskett, Scott<br>Plouffe, Martin-Charles<br>Pownall, Tom   | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>Ironshield Financial Planning<br>National Bank Financial<br>Sigma Wealth  | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod  | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.<br>Vancouver, B.C.   | S147 million<br>S288 million<br>S56 million<br>S207 million<br>S170 million<br>S75 million<br>S56 million<br>S120 million   | 331<br>462<br>200<br>350<br>550<br>181<br>238<br>110   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909  | \$847,000<br>\$2,200,000<br>\$500,000<br>\$2,450,000<br>\$1,600,000<br>\$1,200,000<br>\$650,000<br>\$1,200,000  |
| Meadows, Ryan<br>Muir, Eric<br>Niblett, Tim<br>Nour, Elie<br>Pereira, Jason<br>Plaskett, Scott<br>Plouffe, Martin-Charles<br>Pownall, Tom<br>Pritchard, Tim   | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>Ironshield Financial Planning<br>National Bank Financial<br>Sigma Wealth<br>The Pritchard Wealth Management Group   | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP  | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.<br>Vancouver, B.C.<br>Toronto, Ont.  | S147 million<br>S288 million<br>S56 million<br>S207 million<br>S170 million<br>S75 million<br>S56 million<br>S120 million<br>S145 million   | 331<br>462<br>200<br>350<br>550<br>181<br>238<br>110<br>200  | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000   | \$847,000<br>\$2,200,000<br>\$500,000<br>\$2,450,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000   |
| Meadows, Ryan<br>Muir, Eric<br>Niblett, Tim<br>Nour, Elie<br>Pereira, Jason<br>Plaskett, Scott<br>Plouffe, Martin-Charles<br>Pownall, Tom<br>Pritchard, Tim<br>Rechtshaffen, Ted  | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>Ironshield Financial Planning<br>National Bank Financial<br>Sigma Wealth<br>The Pritchard Wealth Management Group<br>TriDelta Financial   | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel   | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.<br>Vancouver, B.C.<br>Toronto, Ont.<br>Toronto, Ont.   | S147 million<br>S288 million<br>S56 million<br>S207 million<br>S170 million<br>S75 million<br>S56 million<br>S120 million<br>S145 million<br>S180 million   | 331<br>462<br>200<br>350<br>550<br>181<br>238<br>110<br>200<br>103   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699  | \$847,000<br>\$2,200,000<br>\$500,000<br>\$1,600,000<br>\$1,200,000<br>\$650,000<br>\$1,200,000<br>\$1,200,000<br>\$1,400,000<br>\$1,300,000  |
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| <ul> <li>Meadows, Ryan</li> <li>Muir, Eric</li> <li>Niblett, Tim</li> <li>Nour, Elie</li> <li>Pereira, Jason</li> <li>Plaskett, Scott</li> <li>Plouffe, Martin-Charles</li> <li>Pownall, Tom</li> <li>Pritchard, Tim</li> <li>Rechtshaffen, Ted</li> <li>Ritcey, David</li> <li>Rosen, Lewis</li> </ul>   | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>Ironshield Financial Planning<br>National Bank Financial<br>Sigma Wealth<br>The Pritchard Wealth Management Group<br>TriDelta Financial<br>The Ritcey Team<br>Rosen Group Private Wealth Management   | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel<br>ScotiaMcLeod<br>Raymond James Ltd.   | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.<br>Vancouver, B.C.<br>Toronto, Ont.<br>Toronto, Ont.<br>Kentville, N.L.<br>Montreal, Que.  | \$147 million           \$288 million           \$56 million           \$57 million           \$170 million           \$75 million           \$75 million           \$56 million           \$120 million           \$120 million           \$145 million           \$145 million           \$100 million           \$120 million           \$145 million           \$280 million           \$92 million           \$92 million  | 331<br>462<br>200<br>350<br>550<br>181<br>238<br>110<br>200<br>103<br>206<br>450   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699<br>\$446,602<br>\$277,778  | \$847,000<br>\$2,200,000<br>\$500,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,400,000<br>\$1,300,000<br>\$1,300,000<br>\$1,900,000   |
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| <ul> <li>Meadows, Ryan</li> <li>Muir, Eric</li> <li>Niblett, Tim</li> <li>Nour, Elie</li> <li>Pereira, Jason</li> <li>Plaskett, Scott</li> <li>Plaskett, Scott</li> <li>Plouffe, Martin-Charles</li> <li>Pownall, Tom</li> <li>Pritchard, Tim</li> <li>Rechtshaffen, Ted</li> <li>Ritcey, David</li> <li>Rosen, Lewis</li> <li>Rouleau, Lyle</li> <li>Salzer, Arthur</li> </ul>   | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>Ironshield Financial Planning<br>National Bank Financial<br>Sigma Wealth<br>Athe Pritchard Wealth Management Group<br>TriDelta Financial<br>The Ritcey Team<br>Rosen Group Private Wealth Management<br>Rouleau Investment Group<br>Northland Wealth Management   | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel<br>ScotiaMcLeod<br>Raymond James Ltd.<br>CIBC Wood Gundy  | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.<br>Vancouver, B.C.<br>Toronto, Ont.<br>Toronto, Ont.<br>Kentville, N.L.<br>Montreal, Que.<br>Edmonton, Alta.   | \$147 million           \$288 million           \$556 million           \$207 million           \$170 million           \$170 million           \$120 million           \$125 million           \$125 million           \$125 million           \$347 million   | 331<br>462<br>200<br>350<br>550<br>181<br>238<br>110<br>200<br>103<br>206<br>450<br>230<br>230   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699<br>\$446,602<br>\$277,778<br>\$1,510,561<br>\$2,451,046  | \$847,000<br>\$2,200,000<br>\$500,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,300,000<br>\$1,300,000<br>\$1,300,000<br>\$1,748,126<br>\$2,700,000  |
| <ul> <li>Meadows, Ryan</li> <li>Muir, Eric</li> <li>Niblett, Tim</li> <li>Nour, Elie</li> <li>Pereira, Jason</li> <li>Plaskett, Scott</li> <li>Plaskett, Scott</li> <li>Plouffe, Martin-Charles</li> <li>Pownall, Tom</li> <li>Pritchard, Tim</li> <li>Pritchard, Tim</li> <li>Rechtshaffen, Ted</li> <li>Ritcey, David</li> <li>Rosen, Lewis</li> <li>Rouleau, Lyle</li> <li>Salzer, Arthur</li> <li>Saunders, Cyrilla</li> </ul>  | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>IPC Securities Corp.<br>Ironshield Financial Planning<br>National Bank Financial<br>Sigma Wealth<br>National Bank Financial<br>Sigma Wealth Management Group<br>TriDelta Financial<br>The Ritcey Team<br>Rosen Group Private Wealth Management<br>Rouleau Investment Group<br>Northland Wealth Management<br>Saunders Wealth Advisory Group   | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel<br>ScotiaMcLeod<br>Raymond James Ltd.<br>CIBC Wood Gundy<br>CIBC Wood Gundy   | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.<br>Vancouver, B.C.<br>Toronto, Ont.<br>Toronto, Ont.<br>Kentville, N.L.<br>Montreal, Que.<br>Edmonton, Alta.<br>Markham, Ont.  | \$147 million           \$288 million           \$556 million           \$207 million           \$170 million           \$75 million           \$75 million           \$56 million           \$575 million           \$586 million           \$586 million           \$5120 million           \$145 million           \$92 million           \$92 million           \$125 million           \$347 million           \$343 million           \$343 million   | 331<br>462<br>200<br>350<br>550<br>181<br>238<br>110<br>200<br>103<br>206<br>450<br>230<br>230<br>140<br>290   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699<br>\$446,602<br>\$277,778<br>\$1,510,561<br>\$2,451,046<br>\$ 431,034  | \$847,000<br>\$2,200,000<br>\$500,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,400,000<br>\$1,300,000<br>\$1,900,000<br>\$1,748,126<br>\$2,700,000<br>\$1,730,000  |
| <ul> <li>Meadows, Ryan</li> <li>Muir, Eric</li> <li>Niblett, Tim</li> <li>Nour, Elie</li> <li>Pereira, Jason</li> <li>Plaskett, Scott</li> <li>Plaskett, Scott</li> <li>Plouffe, Martin-Charles</li> <li>Pownall, Tom</li> <li>Portchard, Tim</li> <li>Pritchard, Tim</li> <li>Rechtshaffen, Ted</li> <li>Ritcey, David</li> <li>Rosen, Lewis</li> <li>Rouleau, Lyle</li> <li>Salzer, Arthur</li> <li>Saunders, Cyrilla</li> <li>Stockman, Gordon</li> </ul>  | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>IPC Securities Corp.<br>Ironshield Financial Planning<br>National Bank Financial<br>Sigma Wealth<br>National Bank Financial<br>Sigma Wealth Management Group<br>TriDelta Financial<br>The Pritchard Wealth Management<br>Rouleau Investment Group<br>Northland Wealth Management<br>Saunders Wealth Advisory Group<br>Efficient Wealth Management   | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel<br>ScotiaMcLeod<br>Raymond James Ltd.<br>CIBC Wood Gundy  | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.<br>Vancouver, B.C.<br>Toronto, Ont.<br>Toronto, Ont.<br>Toronto, Ont.<br>Kentville, N.L.<br>Montreal, Que.<br>Edmonton, Alta.<br>Markham, Ont.<br>Charlottetown, PEI<br>Mississauga, Ont.  | \$147 million           \$288 million           \$556 million           \$207 million           \$170 million           \$75 million           \$75 million           \$56 million           \$120 million           \$120 million           \$120 million           \$120 million           \$120 million           \$120 million           \$125 million           \$343 million           \$125 million           \$125 million  | 331<br>462<br>200<br>350<br>550<br>181<br>238<br>100<br>200<br>103<br>206<br>450<br>230<br>140<br>290<br>106   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699<br>\$446,602<br>\$277,778<br>\$1,510,561<br>\$2,451,046<br>\$ 431,034<br>\$504,717   | \$847,000<br>\$2,200,000<br>\$500,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,400,000<br>\$1,300,000<br>\$1,300,000<br>\$1,748,126<br>\$2,700,000<br>\$1,730,000<br>\$1,730,000  |
| <ul> <li>Meadows, Ryan</li> <li>Muir, Eric</li> <li>Niblett, Tim</li> <li>Nour, Elie</li> <li>Pereira, Jason</li> <li>Plaskett, Scott</li> <li>Plouffe, Martin-Charles</li> <li>Pownall, Tom</li> <li>Pritchard, Tim</li> <li>Rechtshaffen, Ted</li> <li>Ritcey, David</li> <li>Rosen, Lewis</li> <li>Rouleau, Lyle</li> <li>Salzer, Arthur</li> <li>Stockman, Gordon</li> <li>Sutherland, David</li> </ul>   | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>IPC Securities Corp.<br>Ironshield Financial Planning<br>National Bank Financial<br>Sigma Wealth<br>Sigma Wealth Management Group<br>TriDelta Financial<br>The Pritchard Wealth Management<br>Rosuleau Investment Group<br>Northland Wealth Management<br>Saunders Wealth Advisory Group<br>Efficient Wealth Management<br>CIBC Wood Gundy  | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel<br>ScotiaMcLeod<br>Raymond James Ltd.<br>CIBC Wood Gundy<br>CIBC Wood Gundy<br>Tactex Asset Management  | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.<br>Vancouver, B.C.<br>Toronto, Ont.<br>Toronto, Ont.<br>Kentville, N.L.<br>Montreal, Que.<br>Edmonton, Alta.<br>Markham, Ont.<br>Charlottetown, PEI<br>Mississauga, Ont.   | \$147 million           \$288 million           \$556 million           \$575 million           \$757 million           \$757 million           \$556 million           \$556 million           \$575 million           \$575 million           \$120 million           \$145 million           \$92 million           \$92 million           \$343 million           \$125 million           \$537 million           \$532 million   | 331<br>462<br>200<br>350<br>181<br>238<br>100<br>200<br>103<br>206<br>450<br>230<br>140<br>290<br>106<br>60  | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699<br>\$446,602<br>\$277,778<br>\$1,510,561<br>\$2,451,046<br>\$431,034<br>\$504,717<br>\$533,333   | \$847,000<br>\$2,200,000<br>\$500,000<br>\$2,450,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,300,000<br>\$1,300,000<br>\$1,748,126<br>\$2,700,000<br>\$1,774,126<br>\$2,700,000<br>\$1,770,000<br>\$117,000                                  |
| <ul> <li>Meadows, Ryan</li> <li>Muir, Eric</li> <li>Niblett, Tim</li> <li>Nour, Elie</li> <li>Pereira, Jason</li> <li>Plaskett, Scott</li> <li>Plaskett, Scott</li> <li>Plouffe, Martin-Charles</li> <li>Pownall, Tom</li> <li>Portchard, Tim</li> <li>Rechtshaffen, Ted</li> <li>Ritcey, David</li> <li>Rosen, Lewis</li> <li>Rouleau, Lyle</li> <li>Salzer, Arthur</li> <li>Saunders, Cyrilla</li> <li>Stockman, Gordon</li> <li>Sutherland, David</li> <li>Tetrault, Rob</li> </ul>  | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>IPC Securities Corp.<br>Ironshield Financial Planning<br>National Bank Financial<br>Sigma Wealth<br>Sigma Wealth Management Group<br>TriDelta Financial<br>The Pritchard Wealth Management<br>Rouleau Investment Group<br>Northland Wealth Management<br>Saunders Wealth Advisory Group<br>Efficient Wealth Management<br>CIBC Wood Gundy   | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel<br>ScotiaMcLeod<br>Raymond James Ltd.<br>CIBC Wood Gundy<br>CIBC Wood Gundy<br>Tactex Asset Management<br>National Bank Financial   | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.<br>Vancouver, B.C.<br>Toronto, Ont.<br>Toronto, Ont.<br>Kentville, N.L.<br>Montreal, Que.<br>Edmonton, Alta.<br>Markham, Ont.<br>Charlottetown, PEI<br>Mississauga, Ont.<br>Toronto, Ont.  | \$147 million           \$288 million           \$556 million           \$575 million           \$757 million           \$757 million           \$556 million           \$575 million           \$575 million           \$575 million           \$580 million           \$120 million           \$592 million           \$5207 million           \$5343 million           \$5125 million           \$537 million           \$537 million           \$537 million           \$537 million           \$537 million           \$537 million  | 331           462           200           350           101           238           110           200           103           206           450           230           140           290           106           60           350   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699<br>\$446,602<br>\$277,778<br>\$1,510,561<br>\$2,451,046<br>\$2,451,046<br>\$431,034<br>\$504,717<br>\$533,333<br>\$285,714                           | \$847,000<br>\$2,200,000<br>\$2,450,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,300,000<br>\$1,300,000<br>\$1,748,126<br>\$2,700,000<br>\$117,000<br>\$700,000  |
| <ul> <li>Meadows, Ryan</li> <li>Muir, Eric</li> <li>Niblett, Tim</li> <li>Nour, Elie</li> <li>Pereira, Jason</li> <li>Plaskett, Scott</li> <li>Plaskett, Scott</li> <li>Plouffe, Martin-Charles</li> <li>Pownall, Tom</li> <li>Portchard, Tim</li> <li>Rechtshaffen, Ted</li> <li>Ritcey, David</li> <li>Rouleau, Lyle</li> <li>Salzer, Arthur</li> <li>Saunders, Cyrilla</li> <li>Stockman, Gordon</li> <li>Sutherland, David</li> <li>Tetrault, Rob</li> <li>Thor, Michael</li> </ul>   | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>IPC Securitie | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel<br>ScotiaMcLeod<br>Raymond James Ltd.<br>CIBC Wood Gundy<br>CIBC Wood Gundy<br>Tactex Asset Management  | Surrey, B.C.<br>Burnaby, B.C.<br>Burlington, Ont.<br>Oakville, Ont.<br>Toronto, Ont.<br>Brossard, Que.<br>Vancouver, B.C.<br>Toronto, Ont.<br>Toronto, Ont.<br>Kentville, N.L.<br>Montreal, Que.<br>Edmonton, Alta.<br>Markham, Ont.<br>Charlottetown, PEI<br>Mississauga, Ont.<br>Toronto, Ont.<br>Winnipeg, Man.<br>Midland, Ont.   | \$147 million           \$288 million           \$56 million           \$507 million           \$170 million           \$75 million           \$75 million           \$56 million           \$170 million           \$120 million           \$120 million           \$120 million           \$120 million           \$120 million           \$207 million           \$2125 million           \$347 million           \$125 million  | 331<br>462<br>200<br>350<br>181<br>238<br>100<br>200<br>103<br>206<br>450<br>230<br>206<br>450<br>230<br>140<br>290<br>106<br>60<br>350<br>140   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$5591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699<br>\$446,602<br>\$277,778<br>\$1,510,561<br>\$2,451,046<br>\$ 431,034<br>\$504,717<br>\$533,333<br>\$285,714<br>\$1,164,286                         | \$847,000<br>\$2,200,000<br>\$2,450,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,300,000<br>\$1,300,000<br>\$1,748,126<br>\$2,700,000<br>\$1,730,000<br>\$117,000<br>\$510,000<br>\$117,000<br>\$518,00,000                                   |
| <ul> <li>Meadows, Ryan</li> <li>Muir, Eric</li> <li>Niblett, Tim</li> <li>Nour, Elie</li> <li>Pereira, Jason</li> <li>Plaskett, Scott</li> <li>Plaskett, Scott</li> <li>Plouffe, Martin-Charles</li> <li>Pownall, Tom</li> <li>Pritchard, Tim</li> <li>Rothshaffen, Ted</li> <li>Ritcey, David</li> <li>Rouleau, Lyle</li> <li>Salzer, Arthur</li> <li>Saunders, Cyrilla</li> <li>Stockman, Gordon</li> <li>Sutherland, David</li> <li>Tetrault, Rob</li> <li>Thor, Michael</li> <li>Townsend, Wayne</li> </ul>                       | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>IPC Securitie | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel<br>ScotiaMcLeod<br>Raymond James Ltd.<br>CIBC Wood Gundy<br>CIBC Wood Gundy<br>CIBC Wood Gundy<br>Tactex Asset Management<br>National Bank Financial<br>TD Wealth Private Investment Wealth                 | <ul> <li>Surrey, B.C.</li> <li>Burnaby, B.C.</li> <li>Burington, Ont.</li> <li>Oakville, Ont.</li> <li>Toronto, Ont.</li> <li>Brossard, Que.</li> <li>Vancouver, B.C.</li> <li>Toronto, Ont.</li> <li>Toronto, Ont.</li> <li>Toronto, Ont.</li> <li>Kentville, N.L.</li> <li>Montreal, Que.</li> <li>Edmonton, Alta.</li> <li>Markham, Ont.</li> <li>Charlottetown, PEI</li> <li>Mississauga, Ont.</li> <li>Toronto, Ont.</li> <li>Winnipeg, Man.</li> <li>Winnipeg, Man.</li> <li>Winnipeg, Man.</li> </ul>                          | \$147 million           \$288 million           \$56 million           \$507 million           \$170 million           \$75 million           \$75 million           \$75 million           \$75 million           \$170 million           \$120 million           \$120 million           \$120 million           \$120 million           \$200 million           \$212 million           \$343 million           \$343 million           \$325 million           \$325 million           \$320 million           \$100 million           \$100 million           \$100 million           \$100 million  | 331       462       200       350       101       238       110       200       103       206       450       230       140       290       106       60       350       140       230       140   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699<br>\$446,602<br>\$277,778<br>\$1,510,561<br>\$2,451,046<br>\$ 431,034<br>\$504,717<br>\$533,333<br>\$285,714<br>\$1,164,286<br>\$457,447             | \$847,000<br>\$2,200,000<br>\$2,450,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,300,000<br>\$1,300,000<br>\$1,748,126<br>\$2,700,000<br>\$1,730,000<br>\$117,000<br>\$5700,000<br>\$18,800,000<br>\$1,500,000                                |
| <ul> <li>Meadows, Ryan</li> <li>Muir, Eric</li> <li>Niblett, Tim</li> <li>Nour, Elie</li> <li>Pereira, Jason</li> <li>Plaskett, Scott</li> <li>Plaskett, Scott</li> <li>Plouffe, Martin-Charles</li> <li>Pownall, Tom</li> <li>Pritchard, Tim</li> <li>Rothshaffen, Ted</li> <li>Ritcey, David</li> <li>Rouleau, Lyle</li> <li>Salzer, Arthur</li> <li>Saunders, Cyrilla</li> <li>Stockman, Gordon</li> <li>Sutherland, David</li> <li>Tetrault, Rob</li> <li>Thor, Michael</li> <li>Townsend, Wayne</li> <li>Jucker, Cory</li> </ul> | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>IPC Securitie | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel<br>ScotiaMcLeod<br>Raymond James Ltd.<br>CIBC Wood Gundy<br>CIBC Wood Gundy<br>CIBC Wood Gundy<br>Tactex Asset Management<br>National Bank Financial<br>TD Wealth Private Investment Wealth | <ul> <li>Surrey, B.C.</li> <li>Burnaby, B.C.</li> <li>Burinigton, Ont.</li> <li>Oakville, Ont.</li> <li>Toronto, Ont.</li> <li>Brossard, Que.</li> <li>Vancouver, B.C.</li> <li>Toronto, Ont.</li> <li>Toronto, Ont.</li> <li>Toronto, Ont.</li> <li>Kentville, N.L.</li> <li>Montreal, Que.</li> <li>Edmonton, Alta.</li> <li>Markham, Ont.</li> <li>Charlottetown, PEI</li> <li>Mississauga, Ont.</li> <li>Toronto, Ont.</li> <li>Winnipeg, Man.</li> <li>Winnipeg, Man.</li> <li>Winnipeg, Man.</li> <li>Winnipeg, Man.</li> </ul> | \$147 million           \$288 million           \$56 million           \$507 million           \$170 million           \$75 million           \$75 million           \$75 million           \$75 million           \$120 million           \$120 million           \$120 million           \$120 million           \$120 million           \$212 million           \$22 million           \$347 million           \$324 million           \$325 million           \$325 million           \$325 million           \$325 million           \$325 million           \$321 million           \$325 million           \$325 million           \$325 million           \$100 million           \$101 million           \$102 million           \$103 million           \$105 million           \$105 million | 331         462         200         350         550         181         238         110         200         103         206         450         230         140         290         106         60         350         140         290         106         60         350         140         270         106         60         350         140         230 | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699<br>\$446,602<br>\$277,778<br>\$1,510,561<br>\$2,451,046<br>\$431,034<br>\$504,717<br>\$533,333<br>\$285,714<br>\$1,164,286<br>\$457,447<br>\$616,666 | \$847,000<br>\$2,200,000<br>\$2,450,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,300,000<br>\$1,300,000<br>\$1,748,126<br>\$2,700,000<br>\$1,730,000<br>\$1,730,000<br>\$117,000<br>\$51,800,000<br>\$1,500,000<br>\$1,250,000 |
| <ul> <li>Meadows, Ryan</li> <li>Muir, Eric</li> <li>Nublett, Tim</li> <li>Nour, Elie</li> <li>Pereira, Jason</li> <li>Plaskett, Scott</li> <li>Plaskett, Scott</li> <li>Plouffe, Martin-Charles</li> <li>Pownall, Tom</li> <li>Pritchard, Tim</li> <li>Rotchshaffen, Ted</li> <li>Ritcey, David</li> <li>Rouleau, Lyle</li> <li>Salzer, Arthur</li> <li>Sauders, Cyrilla</li> <li>Stockman, Gordon</li> <li>Sutherland, David</li> <li>Tetrault, Rob</li> <li>Thor, Michael</li> <li>Townsend, Wayne</li> </ul>                       | CIBC Imperial Service<br>Muir Investment Team<br>Tim Niblett/Cuttaxes<br>Elie Nour Group<br>IPC Securities Corp.<br>IPC Securitie | CIBC Imperial Investors Services<br>Raymond James Ltd.<br>Raymond James Ltd.<br>Manulife Securities<br>ScotiaMcLeod<br>RGMP<br>TriDelta Investment Counsel<br>ScotiaMcLeod<br>Raymond James Ltd.<br>CIBC Wood Gundy<br>CIBC Wood Gundy<br>CIBC Wood Gundy<br>Tactex Asset Management<br>National Bank Financial<br>TD Wealth Private Investment Wealth                 | <ul> <li>Surrey, B.C.</li> <li>Burnaby, B.C.</li> <li>Burington, Ont.</li> <li>Oakville, Ont.</li> <li>Toronto, Ont.</li> <li>Brossard, Que.</li> <li>Vancouver, B.C.</li> <li>Toronto, Ont.</li> <li>Toronto, Ont.</li> <li>Toronto, Ont.</li> <li>Kentville, N.L.</li> <li>Montreal, Que.</li> <li>Edmonton, Alta.</li> <li>Markham, Ont.</li> <li>Charlottetown, PEI</li> <li>Mississauga, Ont.</li> <li>Toronto, Ont.</li> <li>Winnipeg, Man.</li> <li>Winnipeg, Man.</li> <li>Winnipeg, Man.</li> </ul>                          | \$147 million           \$288 million           \$56 million           \$507 million           \$170 million           \$75 million           \$75 million           \$75 million           \$75 million           \$170 million           \$120 million           \$120 million           \$120 million           \$120 million           \$200 million           \$212 million           \$343 million           \$343 million           \$325 million           \$325 million           \$320 million           \$100 million           \$100 million           \$100 million           \$100 million  | 331       462       200       350       101       238       110       200       103       206       450       230       140       290       106       60       350       140       230       140   | \$ 444,108<br>\$624,240<br>\$280,000<br>\$591,428<br>\$309,091<br>\$414,365<br>\$235,294<br>\$1,090,909<br>\$725,000<br>\$776,699<br>\$446,602<br>\$277,778<br>\$1,510,561<br>\$2,451,046<br>\$ 431,034<br>\$504,717<br>\$533,333<br>\$285,714<br>\$1,164,286<br>\$457,447             | \$847,000<br>\$2,200,000<br>\$500,000<br>\$1,600,000<br>\$1,200,000<br>\$1,200,000<br>\$1,200,000<br>\$1,400,000<br>\$1,400,000<br>\$1,400,000<br>\$1,400,000<br>\$1,730,000<br>\$1,730,000<br>\$1,730,000<br>\$117,000<br>\$117,000<br>\$118,00,000<br>\$1,800,000     |

COVER STORY / TOP 50 ADVISORS



top-performing advisors. For two months this past fall, WP ran a survey asking Canadian advisors to submit basic data about their practices. We received hundreds of entries, and over the holidays, we crunched the numbers. The result is this: The second annual WP Top 50 Advisors list. Congratulations to those who've made the cut – it's by no means a small feat.

As the wealth management industry matures, so does the calibre of sophisticated, successful advisors in this country. The challenges they confront are legion: low interest rates, market volatility – the list

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Here it is – Canada's most comprehensive list of goes on. But hopefully this ranking of star performers will serve as an example to those looking to figure out how best to juggle client and business objectives in these hectic times. The practices captured on this list embody the kind of business models that all Canadian advisors aspire to achieve. Each member of the Top 50 can, in fact, be held out as a solid example of a business model that works to satisfy client demands and needs. Their numbers bear out the assertion.

> This year, you'll notice a few tweaks to our list. Over the last 12 months, we heard back from many in the industry, resulting in some changes in the

way we calculate the Top 50 list. We used a combination of different quantitative criteria to decide which advisors would make it into the Top 50 assets under management, revenue contributed to the business and AUM per client.

One other change to the list is that we've added a couple of supplementary rankings - one for feebased advisors, and another for those who run their practice on an embedded comp model. What model is 'correct' is a matter of heated debate, but it is our policy to emphasize that there is a place (and need) in the industry for competing approaches to compensation. Today, it sometimes seems, the easy opinion is to suggest that all advice should be feebased. But at some point, this could cut off many middle-income Canadians from access to advisor services – is this necessarily a good thing? As the Canadian financial advisory industry enters a unique

**REGIONAL BREAKDOWN OF TOP 50 ADVISORS** 

Average AUM: \$139.023.152 Total AUM: \$6,951,157,608 Average number of clients: 236 round of change, this debate is far from over.

The other issue we heard from advisors is that overall book size had declined a bit since last year, as advisors revamped their practices to work under the new CRM2 regulations. Congratulations to the advisors who worked through this issue but still made it on to the list.

Keep in mind that this is an annual list – we'll be back next year. We are looking for input from the industry for tips and suggestions we should apply to the generation of this list. This is your list, so we'd love to hear from you concerning methodology.

Again, congratulations to those who made the list, especially those who made it into the top 10. These are the advisors who are not shying away from the challenges of 2015, but instead are charting a successful path through the current economic volatility.



| RANKING | NAME              | COMPANY                        | BROKERAGE/DEALER<br>GROUP NAME | LOCATION        |
|---------|-------------------|--------------------------------|--------------------------------|-----------------|
| 1       | Reg Jackson       | JMRD Wealth Management Team    | National Bank Financial        | London, Ont.    |
| 2       | Lyle Rouleau      | Rouleau Investment Group       | CIBC Wood Gundy                | Edmonton, Alta. |
| 3       | Arthur C. Salzer  | Northland Wealth Management    |                                | Markham, Ont.   |
| 4       | Robert McClelland | The McClelland Financial Group | Assante Capital Management     | Thornhill, Ont. |
| 5       | Eric Muir         | Muir Investment Team           | Raymond James Ltd.             | Burnaby, B.C.   |

## Top 5 advisors by assets (embedded compensation)

| RANKING | NAME              | COMPANY   | BROKERAGE/DEALER<br>GROUP NAME | LOCATION        |
|---------|-------------------|---|--------------------------------|-----------------|
| 1       | Wayne Townsend    | Lawton Partners                                       |                                | Winnipeg, Man.  |
| 2       | Diane McCurdy     | McCurdy Financial Planning Inc.                       | Quadrus                        | Vancouver, B.C. |
| 3       | Shafik Hirani     | Shafik Hirani's Private Wealth<br>Management Practice | Investors Group                | Calgary, Alta.  |
| 4       | Susan Andrighetti | The Andrighetti Group                                 | CIBC Wood Gundy                | Toronto, Ont.   |
| 5       | Cory Tucker       | CIBC Imperial Service                                 | <b>CIBC Investor Services</b>  | Winnipeg, Man.  |

# Top 10 advisors (increase in AUM 2013 to 2014)

| RANKING | NAME             | COMPANY   | BROKERAGE/DEALER<br>GROUP NAME | LOCATION              |
|---------|------------------|---|--------------------------------|-----------------------|
| 1       | David Sutherland | CIBC Wood Gundy                                       |                                | Toronto, Ont.         |
| 2       | Rob Tetrault     | Rob Tetrault Wealth<br>Management Group               |                                | Winnipeg, Man.        |
| 3       | Jeff Ber         | Ber Wealth Management                                 | ScotiaMcLeod                   | Calgary, Alta.        |
| 4       | Cyrilla Saunders | Saunders Wealth Advisory Group                        | CIBC Wood Gundy                | Charlottetown, P.E.I. |
| 5       | Elie Nour        | Elie Nour Group                                       | Manulife Securities            | Oakville, Ont.        |
| 6       | Gene Kim         | Summit Private Wealth                                 | Manulife Securities            | Montreal, Que.        |
| 7       | Arthur C. Salzer | Northland Wealth Management                           |                                | Markham, Ont.         |
| 8       | Shafik Hirani    | Shafik Hirani's Private Wealth<br>Management Practice | Investors Group                | Calgary, Alta.        |
| 9       | Tom Pownall      | Sigma Wealth  | ScotiaMcLeod                   | Vancouver, B.C.       |
| 10      | Lyle Rouleau     | Rouleau Investment Group                              | CIBC Wood Gundy                | Edmonton, Alta.       |
|         |                  |   |                                |                       |

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### The McClelland Financial Group