

Your Personal and Specialized Team of Experts



Lindsay Crooks, CFP

Wealth Advisor

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With over 17 years of investment experience, Lindsay Crooks has taken a personalized approach to wealth preservation and creation by designing innovative financial solutions, uniquely tailored to meet your needs.

PERSONAL TEAM

As a primary advisor I bring together a team to help you achieve your goals. My personal team provides day-to-day servicing of your needs.

Chandra Racic, Administrative Associate

Client service specialist, prompt and efficient handling of all administrative issues.

Our team of experts will help deliver a complete financial strategy tailored to your needs.

Insurance Consultant

- Income/Wealth Enhancement
- Wealth Preservation
- Income Replacement
- Business Protection

Tom Fernandez, B.A. (Econ)

Financial Planning Consultant

- Financial Planning
- Retirement Planning
- Tax Planning
- Estate Planning

Ron Zaporzan, CFP

Scotiabank Specialists

- Day-to-Day Banking Solutions
- Borrowing Solutions
- Small Business Packages

Linda Sudnicki, HB Com,
Account Manager Small
Business

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- Borrowing Solutions
- Small Business Packages

Joyce Kerr, PFP, AICB,
Manager Personal Banking

OTHER PROFESSIONALS WE WORK WITH

We work with your existing professional team to incorporate your legal and tax situation into a complete financial strategy. If you don't already have this support in place we can recommend high quality professionals to work with you.