

# Your Personal and Specialized Team of Experts



## Lindsay Crooks, CFP

Wealth Advisor

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With over 15 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

Blair Smith, B.Comm(Hons),  
CFP,CLU,CH.F.C.,TEP

### 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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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.