

**Blair Smith, B.Comm(Hons), CFP, CLU, CH.F.C., TEP, Senior Advisor** [blair\\_smith@scotiacleod.com](mailto:blair_smith@scotiacleod.com)

### Background and Experience

**Blair** joined ScotiaMcLeod in 2008 with over 16 years experience in the financial services industry. Blair has a Bachelor of Commerce Honours degree from the University of Manitoba and extensive knowledge and experience in both personal and corporate estate planning. He is very involved in the insurance industry, having recently chaired an Advisory Council of insurance professionals for a leading Canadian life insurance company. He also helped organize the 2008 ADVOCIS Manitoba Life Insurance Conference, and is an active member of the Society of Trust and Estate Practitioners since 2002.



### Business Approach

As part of your Scotiabank advisor's team of wealth experts, we offer complete insurance expertise to help you reach your financial objectives. We provide a wealth of knowledge, experience and insight to deliver a variety of solutions that meet your needs and goals, including wealth creation, enhancement, and preservation; income creation and replacement; tax minimization and tax efficient asset accumulation and distribution; business coverage and succession planning; charitable giving and more. We offer professional, objective advice and explore all available insurance strategies to assist in developing your financial plan.

### Services Provided

Working with you and your advisor, we thoroughly evaluate your needs and identify any gaps in protection coverage. We perform a complete analysis of your objectives and audit your current coverage to develop strategic insurance-based solutions to meet your short-term and long-term goals, and demonstrate how these solutions can enhance your overall financial strategy. With a complete understanding of the available products in the marketplace and access to the most technically advanced expertise within the insurance industry, we provide illustrations, explanations, and any other information required to ensure your complete satisfaction with solutions and service throughout the entire process.

