

# The LeBlanc Report

Week of May 20th, 2019

## New addition to the LeBlanc Group

The LeBlanc Group is excited to announce that we are continuing to grow and add new members to our team. Please join us in welcoming our newest team member – Sofii Salimova.

### **Sofii Salimova, Business Development Associate**



Sofii has recently graduated from the University of British Columbia with a combined degree in Economics and Commerce. During her time as a full-time international student, Sofii interned as a Finance Analyst with a private-equity company in downtown Vancouver. Sofii has experience working with a variety of clients and high-profile financial institutions, which gives her an ability to find an individual approach for each case.

Apart from work, Sofii has a passion for event planning, contributing to the National Investment Banking Competition (NIBC) for the past two years. As a Conference Director at NIBC, Sofii led an organizing team in sponsorship, marketing and operations activities.

As a Business Development Associate with the LeBlanc Group, Sofii will work directly with clients and assist in creating informative and visually appealing communication materials.

In addition, we have expanded access to a team of portfolio management specialists. While not new to Canaccord Genuity, their input will have an active role in our portfolios.

### **Tony Dwyer, Senior Managing Director & Chief Market Strategist**

Tony currently serves as the Head of U.S. Macro Group, Chief Market Strategist, and member of the Firm's U.S. Operating Committee. As a Strategist, Dwyer is best known for the practical application of macroeconomic and tactical market indicators designed to assist institutional clients in making intermediate-term market and sector investment decisions. He is frequently seen and quoted on the various Financial News outlets such as CNBC, Barrons, FOX Business, and Bloomberg.

### **Martin Roberge, Managing Director, North American Portfolio Strategy**

Martin serves as a Portfolio Strategist and Quantitative Analyst at Canaccord Genuity. He is responsible for providing tactical asset mix and sector rotation research, and recommendations to the firm's institutional clients. Over the years, Martin has been highly ranked as a portfolio strategist and quantitative analyst in Canada, according to the Brendan Wood International survey. He holds the CFA designation and is a member of the Montreal Society of Financial Analysts.

### **Michel Perera, Chief Investment Officer UK**

Michel is responsible for the investment process at Canaccord Genuity Wealth Management UK, with a specific focus on asset allocation and stock selection. Michel is an experienced investment strategist having spent the past

19 years at JP Morgan Private Bank, where he was the Chief Investment Strategist (EMEA) responsible for running investment strategy and overseeing tactical asset allocation decisions for discretionary portfolios within the region.

## **Cash Management Services**

CGWM recently added a team of 12 dedicated individuals, who are focused on bringing you the best rates on guaranteed investments. By expanding our GIC offering from 9 to over 40 issuers, we now have the largest independent Cash Management group in Canada, offering you top rates in fully guaranteed GICs.

**You will always find your familiar faces and can continue to rely on our commitment to you.**

## **Michael LeBlanc, Senior Portfolio Manager & Investment Advisor - Director, Wealth Management**

Michael is responsible for introducing the Canaccord Genuity Wealth Management (CGWM) private investment offering to Canadian investors and overseeing tailored portfolio strategies. Through his expertise in wealth management and investment advice, Michael provides tailored products and solutions to individuals, families and business owners.

Prior to joining CGWM, Michael worked for a Canadian Bank as an Associate Portfolio Manager and was responsible for driving one of the fastest growing advisory business within the firm. Michael's career also involved Corporate Management in Wealth Management and Advisory roles within the industry.

Michael holds the Chartered Investment Manager (CIM) and the Fellowship of Canadian Securities Institute (FCSI) accreditations.

## **Louvie Ronse, Senior Investment Advisor Assistant**

Louvie is the frontline contact for clients and is here to take care of all the administrative needs daily. She is fully licensed and able to communicate with clients on both the fundamental and advanced levels, ensuring that they feel comfortable and that the team's operations run smoothly.

## **Paul Marion, Managing Director, Wealth & Estate Planning Services**

As our Wealth and Estate Planning specialist, Paul's role is to implement and enhance each individual's advantages to ensure your estate plan is optimally structured. If needed, Paul will make the necessary changes to your current estate plans in order to achieve the maximum amount of income in retirement, while leaving the largest possible gift to loved ones or charity. Paul will give direction regarding your personal situation as well as your business' structure. His addition rounds out our commitment to help you achieve your investment and retirement objectives. To further service our clients' needs, Paul works closely with a team of professionals including lawyers and accountants. He is an expert in complex estate and insurance planning issues supported by an extensive knowledge of the insurance industry.

**Please join us in welcoming Sofiia to the team and we look forward to your feedback on our new communication offerings.**

CANACCORD GENUITY WEALTH MANAGEMENT IS A DIVISION OF CANACCORD GENUITY CORP., MEMBER-CANADIAN INVESTOR PROTECTION FUND AND THE INVESTMENT INDUSTRY REGULATORY ORGANIZATION OF CANADA

This newsletter is solely the work of the author for the private information of clients. Although the author is a registered Investment Advisor at Canaccord Genuity Corp., this is not an official publication of Canaccord Genuity Corp. and the author is not a Canaccord Genuity Corp. analyst. The views (including any recommendation) expressed in this newsletter are those of the author alone, and are not necessarily those of Canaccord Genuity Corp. The information contained in this newsletter is drawn from sources believed to be reliable, but the accuracy and completeness of the information is not guaranteed, nor in providing it do the author or Canaccord Genuity Corp. assume any liability. This information is given as of the date appearing on this newsletter, and neither the author nor Canaccord Genuity Corp. assume any obligation to update the information or advise on further developments relating to information provided herein. This newsletter is intended for distribution in those jurisdictions where both the author and Canaccord Genuity Corp. are registered to do business in securities. Any distribution or dissemination of this newsletter in any other jurisdiction is prohibited. The holdings of the author, Canaccord Genuity Corp., its affiliated companies and holdings of their respective directors, officers and employees and companies with which they are associated may, from time to time, include the securities mentioned in this newsletter.

The preceding information is for general information only and does not constitute tax advice. All investors should consult with a qualified tax accountant.

Tax & Estate advice offered through Canaccord Genuity Wealth & Estate Planning Services.

FOR DISTRIBUTION IN CANADA ONLY