

What's new

Travel insurance

Without proper coverage in place, a dream vacation can quickly become a nightmare. Travel Insurance allows us to plan our vacations with confidence.

Bruce Morrison | Insurance Advisor

Tax services

- Tax preparation
- Bookkeeping
- Tax, Estate and Retirement Planning

It is our priority to continually add services to benefit you, our valued client. Please call should you require our services for your 2016 tax returns.

Estate planning

Our team of advisors can help you execute a customized estate plan that meets your investment goals. Our partnership with HollisWealth allows us access to a team of experienced Estate Planning professionals.

For more information on these and other services we provide please click on the link below:
<http://morrisonpartners.com>

Client corner We received several calls from clients in regards to calls they are receiving from Morrison & Partners from out of town numbers. This issue has been addressed & resolved. In the event that this happens again please let us know.

Morrison & Partners Wealth Strategies

HollisWealth, a division of Scotia Capital Inc.
HollisWealth Insurance Agency Limited

Who to contact

November 2016

Portfolio Managers

Bruce Morrison | Jay DeBoice | Mike Brintnell

Bruce, Jay and Mike have over 50 years of combined experience working in the financial investment sector. They are accomplished portfolio managers, working with clients and the general public on wealth management and comprehensive financial platforms.

Financial Planning Associate

Steve Ambeault, CPA, CA - *Steve joined our office in early 2016 to prepare and submit tax returns for our clients, and to assist our clients with retirement and estate matters, including the preparation of financial projections. Steve has previously specialized in tax at a major accounting firm, and also has experience as an accountant in industry.*

Portfolio Analyst

Dustin Pierce - *As a full time portfolio analyst Dustin's role includes investment idea generation, due diligence and real time monitoring for all portfolio strategies. Dustin has previous experience working with ultra high net worth investors and holds both a Chartered Professional Accountant Designation (CPA, CA) and a Chartered Financial Analyst Designation (CFA).*

Office Manager

Jan Morrison – *Jan is responsible for leading a dynamic team committed to the delivery of "Service Excellence," while managing the quality and overall efficiency of branch operations. Jan is also responsible for all our corporate client events and fundraisers.*

Administrative Team

Harjit Baumann - *Client Services* – *Harjit has many years of experience in client services, retail banking, and communications. Here to assist you with your day to day financial services solutions, including RESPs, transfers, online banking and estate related questions.*

Jayla Bainbridge - *Jayla is located in our Calgary office, and is always happy to assist clients with new accounts, statements, address changes and general inquires. Jayla also assists with event planning and is our primary liaison with head office.*

Lily Sabatier – *Lily works in our Edmonton office, she is our receptionist and the first point of contact for all clients. Lily primarily looks after booking appointments, meeting preparation and general office inquires.*

HollisWealth is a trade name of Scotia Capital Inc. and HollisWealth Insurance Agency Ltd. HollisWealth is a division of Scotia Capital Inc., a member of the Canadian Investor Protection Fund and the Investment Industry Regulatory Organization of Canada. Brokerage services provided by HollisWealth are provided through Scotia Capital Inc. Insurance products provided by HollisWealth are provided through HollisWealth Insurance Agency Ltd. © Registered trademark of The Bank of Nova Scotia, used under licence. Morrison & Partners Wealth Strategies is a personal trade name of Bruce Morrison. HollisWealth and the Scotiabank companies do not provide income tax preparation services nor do they supervise or review other persons who may provide such services.