As a Senior Wealth Advisor with Scotia Wealth Management, Dave takes the time to consider all the factors that make your financial situation unique. He will create a total wealth management strategy that and personalizes your investment portfolio, retirement plan and estate plan.

Dave's expertise has been recognized in local and national media. He holds a Master's degree and the CIM (Chartered Investment Manager), CFP (Certified Financial Planner) and FCSI (Fellow of the Canadian Securities Industry) designations.

Finally know the feeling of finding the person you want to trust with your money. Let Dave and his team create a personalized total wealth management strategy for you: www.dave-lee.ca

Life's transitions. This is where you need us most and this is where we excel. Dave and his team of financial specialists do their best work when helping clients through the financial complexities of transitions such as:

- Retirement transitions
- Downsizing your home
- Business transitions
- Loss of a loved one
- Significant changes in health
- Inheritance

Contact us

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