



■ Left to right: Front row: Lori Berry-Administrative Assistant, Gail Belchior-BA, BEd, PFP, Associate Advisor, Anne Braithwaite-BBA, Administrative Assistant, Bogue Clark-BA, Administrative Associate. Back row: Wayne Triano-BA, MEd, CMA, Investment Advisor, Robin Lewis-CFP, PFP, Investment Advisor, Milan Plentai-BEcon, CFP, CIMA, Senior Investment Advisor and Sean Greenhalgh-BSc, Administrative Assistant.

Wellington West Capital

"We serve our clients first."

Investors looking for a true client-focused approach to their finances don't have to look any further than the dedicated Investment Advisors at Wellington West Capital Inc. (Wellington West).

The St. Catharines team at Wellington West provides wealth management, tax and financial planning (as it relates to your investments), insurance*, asset management and capital markets services to institutions and individuals. With eight team members in St. Catharines and more than 500 across the country, Wellington West is one of the fastest-growing independent full-service investment firms in Canada, administering more than \$9.4 billion in assets.

The St. Catharines team—including Investment Advisors Milan Plentai, Robin Lewis and Wayne Triano—prides itself on their responsiveness and the unique perspective they bring to each client relationship.

"I have access to quotes from vari-

ous international exchanges—London, France and Germany for example—and this gives us and our clients a view to global markets," says Milan.

In recent years, Wellington West has also received several top industry honours. Named one of Canada's 50 Best Managed Companies in 2008, Wellington West was also designated one of the top employers in Canada in the 2008 Hewitt Associates / Report on Business Magazine 50 Best Employers survey.

With their team's focus on providing effective investment strategies and a personalized approach to their clients' needs, Wellington West has become one of Canada's foremost investment firms. That's why Niagara's investors can feel comfortable knowing their finances are in the hands of trusted investment professionals.

"Today's families and foundations are looking for clear direction, solutions and independent advice—and that's what we deliver," Robin says

of their services. "Our advisors are always ready to help with their investment requirements. And that's the reason behind our success—we serve our clients first."

* Insurance products provided by Wellington West Financial Services Inc. Only Milan Plentai, Robin Lewis, Gail Belchior and Anne Braithwaite are Insurance licensed with Wellington West Financial Services Inc.

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COMPANY INFORMATION



NUMBER OF EMPLOYEES
8 people in the branch.

YEAR FOUNDED
1993

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