YOUR ADVISORY TEAM
David Brady

Individuals and businesses obtain financial advice from an experienced team guided by David Brady, a Financial Planner at Selectpath. David and his team are dedicated to ensuring clients receive comprehensive financial advice and first class service.

David S. Brady, B.COMM, CA, CFP

SENIOR FINANCIAL PLANNER

David's career in the financial service industry began as a Chartered Accountant in 1962. After seven years as an Accounting and Tax specialist, he spent 20 years in the Real Estate investment and management business in Quebec, Texas and Ontario. He received his Ontario Securities licence in 1989, and created Southwest Financial Services Inc. in 1992 to become a full service financial planning business; offering Life, Health and Travel Insurance, Mutual Funds, and Segregated Funds; along with investment, taxation and retirement planning services. In 2005, Southwest merged with Rowe Financial Services, who were then acquired by Selectpath in 2007.

SPECIALTIES:

David considers himself a well-rounded generalist in the financial planning industry; however, he considers his specialties to be investment management and Tax and Estate planning for individuals and small businesses. After consultation, David provides people with a plan that will assist them in the accumulation and the preservation of wealth.

DEGREES & DESIGNATIONS:

- Bachelor of Commerce, University of Ottawa
- Licentiate in Accounting, McGill University
- Chartered Accountant (CA)
- Professional Credential of Certified Financial Planner (CFP)

INDUSTRY ASSOCIATIONS:

David is a member in good standing of the following professional organizations and associations, and subscribes to their respective codes of ethics and standards of conduct:

- Institute of Chartered Accountants of Ontario
- Financial Planners Standards Council (FPSC)
- President, Entrepreneurial Chartered Accountants of London
- Treasurer, Rotary Club of London Foundation
- Board Member, Better Business Bureau of Southwestern Ontario
- Board Member, Estate Planners Council of London
- Financial Services Commission of Ontario
- Mutual Fund Dealers Association

Carol Malo

CLIENT SERVICE REPRESENTATIVE

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1070 NASHUA AVENUE LONDON ON N6K 2C3 TEL 519.471.8292 OR 1.888.327.5777 FAX 519.488.1155 INFO@SELECTPATH.CA WWW.SELECTPATH.CA

OUR APPROACH TO

Financial Planning

Working Together

HOW YOU CHOOSE TO WORK WITH A SELECTPATH ADVISOR IS UP TO YOU

Selectpath advisors are experienced and educated professionals dedicated to finding the best solutions for each of our unique clients. But before we begin working with clients, we clearly communicate how we might work together. It's important that we establish expectations and roles for each involved.

At Selectpath, we understand that each of our clients are different. They have unique situations, aptitudes and varied degrees of readiness when considering working with or changing financial advisors. We welcome you to choose how you wish to engage our services, in a way that fits your unique situation.

We are not tied to any one investment product or company. Because we provide a vast array of different products from a number of quality companies, we can recommend the financial instruments that best fit your goals.

Our firm of professionally qualified financial advisors and exceptional support staff will explore the best strategies for helping you achieve success and security. We promise to guide you through a financial planning process that's right for you — Selectpath will put you on *The RIGHT Path®*.

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