



Peace of mind comes with a plan.  
Let's create yours, together.



CIBC  
Wood Gundy

Greenwood White Group



## Build your wealth

Life can be complicated, but investing doesn't have to be. We want you to be able to live your life exactly the way you envision it. Together we can build what is right for you by helping you to:

- Hire the right partners
  - Plan for the long term
  - Borrow with purpose
  - Structure your savings: RRSPs, TFSAs and beyond
  - Sell your business
  - Exercise your stock options
  - Create your own pension plan (IPP)
  - Reduce tax
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## Protect Your Wealth

In our experience, a solid plan will create discipline when it comes to your finances and a calm attitude when life throws you curveballs. To ensure that you are on track with your plan, we will help you:

- Develop an investment discipline
  - Manage risk
  - Monitor your progress
  - Measure your performance
  - Insure to protect your family
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## Make Your Wealth Work for You

You work hard to earn a living, and your savings should work hard for you too. Our team will create strategies tailored to your needs, which may include:

- Income to meet your needs
- Create an annuity stream
- RRIFs
- Help your kids with college (RESPs)
- Retire early





## Create your legacy

We understand that you want to be remembered fondly by your family and community. We can help you plan for the long term with the following strategies:

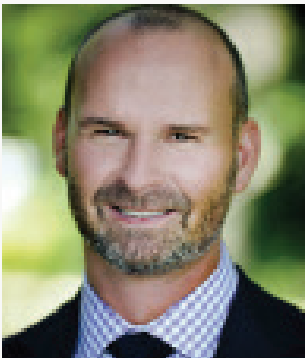
- Structure your estate plan
- Settle a trust
- Pass wealth to the next generation
- Establish a charitable foundation



**John Greenwood**  
**First Vice-President, Branch Manager and Investment Advisor**  
**416 594-8343**  
**[John.s.f.greenwood@cibc.com](mailto:John.s.f.greenwood@cibc.com)**

John is the Branch Manager of the Yorkville Branch. He is also a First Vice-President and Investment Advisor who started his career in the financial services industry in 1985. The basis of John's approach is to thoroughly understand your background and objectives. His goal is to provide you peace of mind, knowing that every available avenue has been thoroughly explored, long before a single proposal is made. The result is solutions that are uniquely suited to you, so that the course you set to achieving your goals is sound. John is able to offer his clients options trading and is also a Life Insurance Advisor with CIBC Wood Gundy, allowing him to better meet your needs, no matter how complex they may be.

John and his wife Karra are busy raising their three very active sons in Toronto. Their weekends are spent in Muskoka during the summer, and Thornbury in the winter, where they are active in the community at large. Together, they support local non-profit organizations and coach local soccer and hockey teams, as well as playing an active role in Toronto's squash community. As members of the Georgian Peaks Ski Club and the Toronto Lawn Club, John and his family enjoy an active and balanced life. It is this same dedication to a balanced perspective that John brings to your financial goals as well as the growth and management of your wealth.



**Peter White**  
**Portfolio Manager and Investment Advisor**  
**416 369-8515**  
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For over 15 years, Peter has guided clients through difficult markets with sound investment and wealth management advice. When working with clients, he brings a calm, consultative, and disciplined approach, and pairs it with an outstanding level of client service. This allows him to look after a wide range of clients, from high net worth individuals, to trusts and estates that require tailored portfolio solutions and attention to detail. He is experienced in tough market conditions and has strong relationships with thought leaders throughout the financial services industry, including key analysts and traders, as well as tax, legal and banking professionals who provide unique insights and access to pertinent market information.

Peter graduated from Queen's University with a joint BA/BeD in 1997, and received his Chartered Financial Analyst (CFA) designation in 2002. He is well-versed in the advanced principles and practice of modern portfolio theory, which he applies as a licensed Portfolio Manager, one of the investment industry's most coveted titles. He also holds his options license and is a licensed Life Insurance Advisor with CIBC Financial Services Inc.

Outside of business hours, Peter (or "Pete" to those who know him well), his wife Kathleen and their young daughter Gwyneth live an active life, enjoying the outdoors or their family homes on Vancouver Island and in the Collingwood area. Pete is an avid fly fisherman and member of leadership committee of the Nekabong Fishing & Hunting Club, a private club located north of Pembroke that was founded by members of Pete's family in the late 1800s.

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