



TEC 9262 **Nancy Graham, CA, CFP, TEP**
Associate Profile Investment Advisor

Name: Nancy Graham, CA, CFP, TEP, Investment Advisor
Company: **PWL Capital Inc.**
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Products/Services

Nancy Graham and her team offer wealth management services to:

- senior professionals (ie. lawyers, physicians, dentists, pharmacists and other specialists)
- senior executives
- owners of medium-to-large business

Like all PWL Capital advisors, Nancy offers financial planning and investment management advice that's focused on reducing your risk and based on a scientifically sound approach. And because her services are fee-based, you can be sure her advice is unbiased. Nancy does not push products and there are no hidden fees. No hype. Just solid common sense. With Nancy and the rest of the Ottawa team there are no surprises.

Professional Background

Nancy's expertise is based on her background as a CA, having worked as a tax practitioner for two major accounting firms and her 15 years' experience in wealth management. In addition to designing plans that are tax efficient, she will develop and manage a complete and transparent financial strategy that includes:

- tax efficient portfolio management and other tax strategies
- strategies for professional incorporation
- respect for insider trading constraints
- income splitting for your family
- tax efficient estate structures
- protection of your professional, business and personal assets
- regular follow-up

Nancy believes in giving back to the community. She is a member of the Board of Governors of the Community Foundation of Ottawa and a member of the Foundation's Investment Committee. She is Past Chair of the Nomination and Awards Committees for the Business Woman of the Year awards. This enables Nancy to see first-hand the positive impact and success that she can help her clients and the community achieve. She has authored financial articles for *Lawyers Weekly* and *CA Magazine* and has been a speaker on investment matters to the *County Carleton Law Association*.