FORWARD THINKING, RISK-MANAGED, WEALTH MANAGEMENT

TriVest Wealth Counsel

Wellington-Altus Private Counsel Inc. is a subsidiary of Winnipeg-based Wellington- Altus Financial Inc., the parent company to one of the fastest-growing wealth advisory companies in Canada.


WELLINGTON-ALTUS
Please Ring
for Service

Welcome to
TriVest Wealth Counsel*

Martin Pelletier, CFA
Craig Stanford, MBA, CFA

*“Together, we provide high net worth clients an award-winning wealth management experience backstopped by the extensive resources and exclusive relationships of Canada’s number one ranked investment advisory firm.”***

Wellington-Altus Private Wealth Rated the **#1 wealth advisory company in Canada** in the 2022 Brokerage Report Card. The only firm to achieve a **net promoter score of 100**.

Recognized as one of **Canada’s Best Managed Companies** since 2021 for leadership in strategy, capabilities and innovation, culture, and financials for sustainable growth.

Named **Brokerage of the Year.** Excellence Awardee for **Most Innovative Use of WealthTech**.

Awarded **5-Star Brokerage** for excellence in key areas supporting advisors’ businesses.

**The TriVest Wealth team is part of Wellington-Altus Private Counsel*
***Investment Executive 2022 Brokerage Report Card*

BUILDING A FINANCIAL ROADMAP

The TriVest team aims to simplify complex wealth planning matters for high net-worth families to assist them in achieving specific goals and objectives which can range from financial freedom to managing the transition of their estate.

This includes custom designing an advanced wealth, tax and estate plan complimented by a risk-managed investment strategy that is properly aligned with each family's vision for the future.

MANAGING RETURNS ALONGSIDE RISK

Higher returns often mean higher volatility -so how do you know when it's worth it to be more aggressive and when you should settle for more stable, returns? And how can you know if you're taking the right approach?

Our work includes managing both risk and return with a proven a framework to help you find the right balance between the two.

OUR FAMILY OFFICE PROCESS

We differ by utilizing an approach to managing wealth that has been deployed for years by family offices and multi-family offices. It begins with a planning-led process whereby we partner with the client in identifying what their specific goals are for their family's wealth.

It is then followed by the construction of a comprehensive wealth plan with a Financial Planner and tax professional on how best to achieve these objectives while taking as little risk as possible through portfolio design.

The result is that we are able to add a level of predictability and some certainty around the client's financial future and what they hope to achieve.

This can include tax-minimized wealth transfers, cross-border retirement, or as simple as ensuring enough is saved to preserve certain lifestyle during retirement.


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Hallmarks of the TriVest Team

VALUES

The TRI in our name stands for **T**rust, **R**isk-Management and **I**ntegrity. As discretionary portfolio managers we maintain a legal Fiduciary responsibility to our clients.

BENCH STRENGTH

All our portfolio managers hold the industry's gold-standard CFA designation. Our expertise has been recognized by numerous industry awards for excellence.

INTEGRATED OFFERING

Our team offers a comprehensive service including Estate planning, Tax planning, Retirement Planning, Insurance, Philanthropy, Portfolio Design, and Money Management.

Martin Pelletier, CFA
Senior Portfolio Manager
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403.536.6444

Martin has over 20 years of investment industry experience including senior-level positions in both institutional equity research and portfolio management.

Prior to co-founding TriVest and its sale to Wellington-Altus in early 2020, Martin's career was focused on institutional energy equity research and capital markets primarily at two top-ranked boutique investment banks. He provided investment recommendations on energy markets, commodities, and individual security selections to institutional fund managers located in Canada, the U.S. and Europe.

Martin is regularly featured in the media as a market strategist including his weekly column to the Financial Post's Investment Pro section for the past decade. He was won numerous awards for his passion for financial education and quality of service provided for his clients.

Martin holds a Bachelor of Commerce degree with a specialization in finance from the University of Alberta, studied international economics and finance at Örebro University in Sweden, and is a Chartered Financial Analyst (CFA) Charterholder.

Martin grew up in a small farming community in Northern Alberta and believes in the power of positive innovative change having lived in Canada's first Eco-community. He and his family is also passionate about mental-health awareness initiatives focused on youth impacted by ADHD, OCD and Autism. On weekends, his family can be found on a mountain either freestyle/big mountain skiing or downhill mountain biking.

Craig Stanford, MBA, TEP, PFP, CFA
Senior Portfolio Manager
craig.stanford@wellington-altus.ca
403.536.6443

Craig has over 25 years of senior-management experience in the investment and finance sector.

His prior Portfolio Manager and Investment Counsellor positions include the following: Partner/Director of Private Client Portfolio Management Mawer Investment Management; and, Managing Director/Portfolio Manager Cypress Capital Management. Craig also worked for Royal Bank Financial Group as a Senior Account Manager, Global Private Banking, providing offshore and domestic solutions to high net worth clients, trusts, foundations, and not-for-profits.

In addition, he worked as a Trust and Investment Advisor for Royal Trust providing offshore and domestic portfolio management, custody, estate, and IBC formation services.

Craig is a Chartered Financial Analyst (CFA) Charterholder. He obtained a Master of Business Administration degree and a Bachelor of Science (Agriculture) degree from the University of Alberta. In addition, he holds and maintains the Trust and Estate Practitioner (TEP) and Professional Agrologist (P.Ag.) designations and is a Personal Financial Planner (PFP).

Craig enjoys a variety of sports and remains active in the agriculture sector with his family's farm in Southern Alberta. He is also e community and works with his wife for various charities.

Kathy Holod, B.Comm
Portfolio Associate
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431.807.8920

Kathy has been in the financial industry for 20 years and holds her Bachelor of Commerce degree with a major in Finance. Prior to joining Wellington-Altus Private Counsel, she worked as a Senior Financial Advisor at a Canadian bank overseeing 250 households.

Wanting to phase into retirement, Kathy stepped away from being an advisor and has been in a supporting role as Portfolio Associate for the past three years.

For fun, Kathy enjoys spending time with her husband Geoff and her two adult children, Jefferson and Miranda. In her spare time, she is quite active hiking, running, fishing, curling and cross-country skiing..

In the Media

Our team is a huge believer in the power of financial education.

Martin Pelletier is regularly featured in the media for his views on the markets, investment strategies, risk-management and general investor education.

He has written a weekly Investment Pro column for the Financial Post over the past decade, and is regularly featured within the Globe and Mail, BNN Bloomberg, CTV, CBC, Macleans, Wealth Professional, and Fox Business.

Wellington-Altus Private Counsel Inc.

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