



Blaine W. Tigert, CIM, PFP, FCSI Portfolio Manager, Investment Advisor



Over the past 20 years, I have built a successful full-service Investment Advisory practice, the Tigert Wealth Management Group, by providing my clients a disciplined approach to money management and exceptional customer service.

I hold the Chartered Investment Manager (CIM) designation, I am a Personal Financial Planner (PFP) and I have been recognized as a Fellow of the Canadian Securities Institute (FCSI), the most senior financial service designation available in Canada.

I am a graduate of the University of Western Ontario, and continuously build on my body of knowledge for the benefit of my clients. After four generations, my family has strong roots in Toronto, where I reside with my wife JoAnne and our two daughters.

“I understand the importance of exceptional client service and regular client contact. I make myself available to my clients for immediate advice.”

What do the majority of my clients worry about?

Having sufficient money for retirement –
Running out of money during retirement –
Protecting their wealth for their children.

I am passionate about helping people achieve their financial goals. As partner in your financial success, my sole responsibility is to protect and grow your wealth. I do this by developing a thorough understanding of your personal and financial situation and then constructing a customized portfolio to meet those goals. You should be investing based upon your priorities, not based on some index.

With the investment landscape becoming increasingly complex, along with the growing number of investment options available, I believe it is critical to have an investment professional working for you, so you can focus your career, your family, and your life.

My Investment Philosophy and guiding principals

▶ I believe my clients deserve a portfolio which is customized to their financial

situation and goals, not a “one strategy fits all approach”. I understand the needs of my clients first, then proceed to create a portfolio with suitable risk levels and proper diversification.

- ▶ I believe it is important to have a disciplined approach to managing money. The key to providing consistent returns is to have a strong process aimed at capital preservation with a focus on growth and income.
- ▶ I understand the importance of exceptional client service and regular client contact. I make myself available to my clients for immediate advice. My entire team at the Tigert Wealth Management Group is committed to providing you and your family with the most comprehensive personal service.
- ▶ The more successful we become in life, the more complex our financial lives become. I offer a wide breadth of services to meet your Wealth Management needs. This extends beyond my core function as your portfolio manager to developing your personal strategy for retirement, estate, and tax planning.

How do I provide my services?

Discretionary Managed Account:

A discretionary managed portfolio gives you the benefit of having a professional making the decisions in your portfolio with your best interest in mind. As a client, you no longer have to make all the decisions, which ensures your emotions will not get in the way of performance, allows me to rebalance your portfolio rapidly when the markets are volatile, and seize opportunities as they arise. The portfolio is always managed inside of well-defined parameters according to your personal investment policy statement. With the capability of block trading, you don't need to worry anymore if you are called first or last to benefit from an investment opportunity.

Advice Based Account (flat fee):

A flat fee account allows you to focus strictly on the strategic value of investment decisions knowing there are no transaction fees. A flat fee is charged simply based on the value of your account and fully aligns our interests. When your portfolio value goes up, so does my compensation.

Transactional Account:

Many people will agree that the commission system is certainly one of the more equitable. The cost of ongoing advice and service is built into these transaction fees, so the only time you actually have to pay anything is when a security is bought or sold in one of your accounts.

Types of Accounts

Investment Accounts (Cash, Margin, Option)
RRSPs, RRIFs, LIFs
RESPs
TFASAs
Corporate/Estate Accounts

Products offered

Stocks
Preferred Shares
Bonds, Convertible Debentures, GICs
New Issues
Mutual Funds
ETFs (Exchange Traded Funds)
Structured Notes
Annuities

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New clients accepted by referral only.

About National Bank Financial – Wealth Management

National Bank Financial – Wealth Management is one of the top six investment dealers in Canada. The firm can trace its roots back to 1902, a time when many of its current competitors had yet to see the light of day. National Bank Financial, a subsidiary of National Bank of Canada is an integrated firm. Present in all regions of Canada, the firm also has operations in the United States and in Europe. National Bank Financial combines individual advisory and brokerage services with institutional brokerage, corporate finance, and third-party securities clearing and brokerage services. It employs over 3000 people working in offices located in Canada's major urban centres.

We are one of the leading firms in institutional equity sales and trading and highly regarded for the quality of our equity and capital market research. In fact, each year we are recognized by Brendan Wood International in several award categories.

If you have questions or want more information, please do not hesitate to contact us.