

# DAVID WOO

## Primary Role

To guide you through a successful wealth management experience, using logical, structured strategies to help you achieve your long-term vision.

## Fast Facts

- ◆ Senior Financial Planner
- ◆ B.Comm (Hons. in Finance), CFP (1991), RFP
- ◆ Experience: Four years with CIBC World Markets (formerly Wood Gundy) in London, UK
- ◆ Clientele: Physicians, Engineers, Academics, Business Executives and Owners
- ◆ Core beliefs: Client relationship is key – it's about more than raw skills
- ◆ Partner: Danielson Group Wealth Management

## Service Summary

- ◆ Comprehensive wealth management
- ◆ Evidence-based Investment management solutions
- ◆ Overall portfolio design and construction
- ◆ Retirement income planning
- ◆ Risk management
- ◆ Tax, estate and will planning
- ◆ Client education
- ◆ Wealth 360

## Financial DNA: Strategist

Strategists excel by blending their strong drive to reach goals with a desire for precision, accuracy, and quality. As a result, they are equipped to be strategic players in situations where achieving results is a priority. They have an ability to achieve ambitious goals and concentrate on matter-of-fact, practical issues.



**Transparency, clarity, and empathy:** these are David's guiding principals for serving his clients. He especially enjoys working with clients who take an active interest in their financial health; clients who value his carefully-considered and structured approach to managing their wealth and investment portfolios.

Financial planning is a long-term journey, so he wants his clients to feel well-informed and confident of their decisions each step along the way. As a result, he works hard not only to craft custom financial strategies that lead clients toward their unique goals, but also to explain the rationale behind his recommendations.

Life balance is important to David, and he loves being an active leader in his son's recreational activities including hockey, baseball, and Scouts Canada.

David has also lived in some interesting places. He started life in Northampton, England, grew up in Saskatoon, then started his career in London, England. He finally discovered the West Coast in 1991, and he and his family have happily settled right in!