



**EMPLOYER AND POSITION**

RBC Dominion Securities - Investment Advisor

- Lead a private wealth management practice for affluent individuals and families, business executives, not-for-profit and charitable organizations, and first-generation wealth builders.

**EDUCATION**

MBA, Queens University (2017)

- Class of 2017 Valedictorian
- Stephen J.R. Smith MBA Scholarship recipient
- GMAT Score of 710

B.Eng., Carleton University (2011)

- Dean's Honour List for the 2010/2011 academic year

**EMPLOYMENT HISTORY**

2025 - Present, Investment Advisor, RBC Dominion Securities

2019 - 2025, Vice President, RBC Capital Markets

2017 - 2019, Associate, RBC Enterprise Leadership Development Program

2015 - 2016, Vice President / Co-Owner, J & J Engineering and Management Inc.

2011 - 2015, Civil Engineer, J.L. Richards and Associates

**ACTIVITIES IN ADVOCACY ORGANIZATIONS**

Member, RBC Corporate Client Group Diversity & Inclusion Committee

**YEARS OF REGISTRATION WITH PROFESSION**

PEO, 10 years (2015 – present)

**COMMUNITY SERVICE**

President, OMS Montessori (2021 – 2025)

- Oversee a volunteer board of 12 directors whose responsibilities include hiring and evaluating the head of the school, developing and monitoring policies for the governance of the school, long-range strategic and budget planning, and fiscal decision making
- Investigate complaints and resolve grievances filed by parents/staff against the head of the school
- Advise on financial, legal, and remuneration-related matters

Founding Chair, OMS Foundation (2025)

- Lead the establishment of OMS Foundation – an independent capital arm of OMS Montessori with projected \$6M assets under management

**CANDIDATE STATEMENT**

Over the past 10 years at RBC, I have developed a deep understanding of financial strategy, risk management, and organizational resilience. My roles have spanned corporate finance, investment management, risk management, and strategic advisory, equipping me with the ability to navigate complex financial landscapes and drive sustainable growth.

A highlight of my journey has been my 4-year tenure as Chair of the OMS Montessori board in Ottawa. In this role, I spearheaded initiatives to strengthen governance frameworks, improve financial transparency, and align strategic priorities with community needs. This experience underscored my ability to distinguish between operations and governance—a critical skill for any board.

As a P.Eng. with a decade-long career in the finance industry, and a proven track record in nonprofit governance, I am eager to bring to OSPE my financial acumen, business development and strategic leadership capabilities. My P.Eng. designation has carried me far in life, and I am now in a position to contribute meaningfully to OSPE's mission of advancing the engineering profession.