



INVESTMENT LEADERSHIP WEALTH PLANNING AND WISE COUNSEL

JOHNSON-PEREZ WEALTH MANAGEMENT

Objective Advice

At Raymond James, Donna and Katherine are free to advise you objectively. They have the flexibility to choose from a virtually unlimited universe of investment options according to what is right for you and your needs.

Coaching to Achieve Wealth and Wisdom

Donna Johnson and Katherine Perez both believe in the importance of giving – and receiving – coaching.

They use Strategic Coach®, an entrepreneurial business coaching program based in Toronto, to enhance their own practice with advanced models and tools, and take very seriously the privilege of coaching clients to enhance their wealth.

Service to clients and community

Donna and Katherine both share a passion for helping people. Donna has worked for several years as a mentor for the Rotary's Stay in School Program.

Katherine is a mother of two school-aged kids and serves as an Executive member of the Rosedale Parent Association in support of Rosedale School.

A Full Suite of Services

The Johnson-Perez Wealth Management Group provide comprehensive and intergenerational strategies for families, organizations, corporations, and individuals who have significant financial resources and recognize the need for long-term financial management. The team delivers much more than stocks – they offer all the right tools for the right circumstances: retirement, education, insurance, and estate strategies as well as investment leadership. Their wealth plan will address your needs now and remain flexible over time as your circumstances change, setting you free to fulfill your life's mission without financial concerns. Donna Johnson and Katherine Perez also act as your trusted family advisors.

Unique Skills -- *More than the sum of two parts*

Donna Johnson and Katherine Perez engage their clients in the wealth process, tailor individual portfolios to changing needs and take leadership when appropriate to keep clients on course. They each have unique and complementary skills:

Donna provides team leadership and delivers strategic guidance to clients regarding important, long-term decisions that affect their finances over a lifetime. She serves on your family's "Board of Directors" along with your other trusted advisors such as your accountant, lawyers, and physicians. Her clients value her warmth, wisdom and entrepreneurial spark.

Katherine simplifies the complexities of today's financial world into smart strategies that matter to you and your family. In staying connected to clients, she ensures that the team adapts to your changing needs. Her clients have enjoyed long-term collaboration, respect and counsel.

Stability

Raymond James Ltd. is one of the largest independent wealth management firms in Canada. In Canada and across our network, we share a vision of delivering the highest level of wealth management advice by always focusing on the unique needs of each client and their families. This client-first focus is further underscored by our core values of professional integrity, advisor independence and a conservative, long-term approach to investing. We are committed to protecting what's important to you.

RAYMOND JAMES®



Donna Johnson

Vice President and Financial Advisor, Private Client Group

Donna has enjoyed working in the financial services industry since 1986 and takes her role as Financial Advisor very seriously. Donna holds an MBA from the University of Manitoba. Donna and Katherine both share a passion for helping people. In her personal life, Donna enjoys golf, tennis and strumming her guitar with tremendous enthusiasm.



Katherine Perez

Vice President and Financial Advisor, Private Client Group

Katherine has enjoyed working with investors since 1998. A proponent of continuing education, she recently earned her Chartered Investment Manager (CIM®) designation, qualifying her to perform discretionary services as a Portfolio Manager. She also holds a BA from the University of Calgary. When she is not working with investors, you will find her at a soccer pitch cheering on her active boys, or trying her hand at baking.



James McLean

Associate Financial Advisor

James has been working with clients in financial services since completing his BA from the University of Lethbridge in 2008. He continually pushes himself to learn more, and is currently working towards both the Chartered Investment Manager (CIM) and Chartered Financial Planner (CFP) designations. Staying active is important to James, and he enjoys competing in triathlons, basketball and skiing when not working or spending time with his wife and son.

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