Michael Chisholm

Michael Chisholm brings more than 20 years of financial industry experience to his clients. Michael's experience spans multiple banking divisions including Commercial Banking, Trust and Estate Planning and Wealth Management.

His strong financial background, combined with in-depth knowledge of charitable investing and legacy planning, has fostered a deep understanding of the unique needs of charities and not-for-profit organizations.

With this understanding, Michael guides clients through the Wealth Planning process and the development of their overall estate strategy. These then translate into sound investment policy statements, which Michael uses to achieve strong returns for clients that weathering various economic conditions.

His Legacy planning expertise bridges both the personal and charitable giving. He has advised various charities in the development of their major gift strategies, developing and rebuilding in-kind securities gift processes, and educating clients on the complex world of securities trading.

Michael's belief is that in today's global information age and fast moving markets, the highest level of due diligence needs to be completed to reduce risk. Furthermore, it is the depth of his wealth management team that is the best way to achieve a strong rate of return for his clients while mitigating risk. Michael was born and raised in Toronto and was educated at St. Francis Xavier University. As a proud supporter of many local and national charities, Michael is an active member in The Canadian Association of Gift planners, and is active with other charitable organizations. In his spare time, Michael enjoys spending time at the family cottage with his wife and young children.