



KIM INGLIS

B.Com, CIM, PFP, FCSI, AIFP

*Financial Advisor & Associate Portfolio Manager
Financial Columnist
Media Commentator*

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Media Sheet

BRIEF BIO:

Kim is the founder of Inglis Private Investment Counsel, a financial advisory practice within Raymond James Ltd. Kim manages the discretionary investment portfolios of high and ultra-high net worth clients.

Kim regularly receives requests from the media for interviews and quotes, and has appeared on the Business News Network (BNN) and CTV News Network. Kim is also a nationally syndicated financial columnist, a contributing columnist for the Financial Post, and a frequent speaker at business events. Kim is also a regular columnist for Business In Vancouver and several community newspapers across Canada. Her work has been featured in most of the country's major newspapers.

AREAS OF EXPERTISE:

Planning:

- Discretionary wealth management
- Portfolio management & construction
- Asset allocation
- Investment processes (active vs passive, quantitative vs qualitative, etc.)

Investments:

- Canadian and U.S. large cap equities
- Alternative investments and structured products
- Exchange-traded funds (ETFs)

Markets:

- Broad market overview & global investing
- Sectors: Consumer Staples, Consumer Discretionary, Technology



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EXTENDED BIO:

Kim is the founder of Inglis Private Investment Counsel, a financial advisory practice within Raymond James Ltd. Kim manages the discretionary investment portfolios of high and ultra-high net worth clients.

Based in Toronto, She earned a Bachelor of Commerce (BCom) degree and the following designations: Canadian Investment Manager (CIM), Personal Financial Planner (PFP), and Accredited Investment Fiduciary (AIFP). She is also a Fellow of CSI (FCSI), a designation granted to financial professionals who have met the highest standards for education, ethics, and experience. As well, Kim has her options license and U.S. securities license.

Kim received the 2012 & 2013 Five Star Wealth Manager Award, an award given to less than 2 percent of the wealth managers in the Vancouver area. She was also a finalist for the 2015 Advisor of the Year at the Wealth Professional Awards.

Kim is a recognized authority on investments and personal finance strategies. She regularly receives requests for interviews as a media commentator and has appeared on the Business News Network (BNN) and CTV News Channel. She has also been quoted in The Globe and Mail.

Kim is a contributing columnist for the National Post and Financial Post. She's also the regular financial columnist for Business In Vancouver and several community newspapers across Canada. Her writing has been featured in the Vancouver Sun, Vancouver Province, Ottawa Citizen, Calgary Herald, Edmonton Journal, Saskatoon Star Phoenix, Regina Leader-Post, Windsor Star, Montreal Gazette, and Victoria Times Colonist. Additionally, Kim was a featured expert in a Ryerson McGraw-Hill textbook for university students.

Kim strongly believes in giving back and actively contributes to the community. She is a regular volunteer with the Toronto Police Service, helping in their mounted unit. She is also a past President and Director of the New Stride Thoroughbred Adoption Society, a non-profit organization dedicated to finding adoptive homes for non-competitive and injured Thoroughbred racehorses. Kim remains actively involved as coordinator of the charity's annual Thoroughbred Jumper Challenge.

Kim is an ardent fan of many sports and regularly competes in triathlons. She is an avid equestrian and applies the same enthusiasm to downhill skiing. Prior to university, Kim was an elite national-level athlete in flat water sprint canoe.

LIBRARY:

Newspaper columns: <http://www.kiminglis.ca/newspapers.html>

Television appearances: <http://www.kiminglis.ca/television.html>

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