

Kelli M. Costigan

CIM®

Senior Portfolio Manager
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I believe wholeheartedly that shared knowledge is power. For more than 25 years, I've been given the gift of serving the community of Canada's physicians in a way that takes great care of their financial well-being and longevity. As a Senior Portfolio Manager, I work to develop fully customized wealth plans set up for long-term success, meeting every financial need and goal along the way. Building strong relationships is one of my deepest passions.

I am a graduate of St. Francis Xavier University and hold the Chartered Investment Manager designation. I have celebrated 30 years of continuous learning with the CFA Institute and am a member in good standing. I am also a member of the CFA Society Ottawa.

I stay very busy with my fantastic family, and my husband and I are very proud of our two adult children. I am an avid golfer, a sport that my husband and I enjoy together. We also curl in the winter. We love to travel and we get as much of this in as we can during the year, exploring different countries. I am a very positive person, starting each day with energy and joy.

Our history of physician-focused experience enables us to understand and anticipate the needs of physicians and their families at every stage of their career, from the first day of medical school to practising and through retirement. As the size and complexity of your investment portfolio increase, so do the amount of time and expertise required to manage it. MD Private Investment Counsel (MDPIC) provides discretionary investment management and personalized expertise through a dedicated MDPIC Portfolio Manager and MD Advisor.*

* MD Advisor refers to an MD Management Limited Financial Consultant or Investment Advisor (in Quebec).

All insurance products are sold through Scotia Wealth Insurance Services Inc., an insurance agency and subsidiary of Scotia Capital Inc., a member of the Scotiabank group of companies. When discussing life insurance products, advisors are acting as Insurance Advisors (Financial Security Advisors in Quebec) representing Scotia Wealth Insurance Services Inc.

MD Private Investment Counsel offers investment counselling services, delivered by MD Financial Management Inc.



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