We provide a comprehensive wealth advisory service to individuals, families, business owners and corporations. Backed by the strength, expertise and knowledge of Canaccord Genuity, we have access to an extensive range of solutions to support and help you reach your financial objectives.

OUR PROCESS

DISCOVERY

Understanding your financial preferences, priorities and goals. Through mutual trust, we develop our relationship and ensure we represent you and your family's best interest.

PLANNING

Developing your financial plan. This plan is a result of extensive research and collaboration with you and our team. It thoughtfully includes the range of investments and approaches to best meet your goals, preferences and priorities.

IMPLEMENTATION

Investing your money. We invest your money according to the plan we have developed together. You know exactly where your money is invested and how each investment contributes to reaching your goals.

MONITORING

Monitoring and making changes. We constantly monitor your investment portfolio. Through regular and ad hoc progress meetings with you, we make or advise on any adjustments due to market changes or changes in your life, priorities or goals.

OUR SERVICES

Investment Strategy & Management

Philanthropic Strategies & Services

Comprehensive Financial Planning

Estate & Trust Solutions

Insurance Solutions

Strategic Partnerships with Industry Professionals

Robert Greben

Investment Advisor

416.867.2389 | rgreben@cgf.com

For more than 20 years, Robert Greben has helped clients find the right investments to meet their objectives.

A native of New York, Robert began his career in retail before pursuing a career in the investment industry. His time at Macy's in New York and California and helping build Canadian retailer, Club Monaco, taught him the importance of customer service and great product. Robert credits his late father with inspiring his passion for helping clients to realize their life's dreams. Robert holds a bachelor's degree in Business Administration from the State University of New York at Brockport, as well as several qualifications from the Canadian Securities Institute. Robert gives back to the community by supporting the Baycrest Foundation for Cognitive Research as well as participating in the Princess Margaret Ride to Conquer Cancer. Outside of the office, he enjoys scuba diving, competing in triathlons, spending time with his daughter, and constantly exploring and expanding his knowledge

Anila Mubeen

Investment Advisor Assistant

416.867.6041 | amubeen@cgf.com

Anila joined Canaccord Genuity Wealth Management in 2018. Prior to joining Canaccord Genuity she has worked with BMO as an Investment Specialist.

She works closely with the team to provide timely processing of service requests, resolving client issues, handling client inquiries all while providing excellent client service. Anila holds Masters of Business Administration from the Institute of Business Administration (IBA), Pakistan, as well as the successful completion of the Canadian Securities Course offered by the Canadian Securities Institute.

Michael Bellamy, BComm, PFP

Wealth & Estate Planning Specialist

Michael joined Canaccord Genuity Wealth & Estate Planning Services Ltd. in 2011. He has been collaborating with our team to help us realize our clients' tax mitigation, wealth protection, insurance, legacy planning and estate planning objectives. Michael holds the Personal Financial Planner (PFP) designation, as well as a Bachelor of Commerce from McMaster University.

Visit us online at www.robertgreben.com