



JOSEPH ALFIE

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Investment Advisor | Conseiller en placements

HollisWealth®, a division of Industrial Alliance Securities Inc.

Myriad Private Wealth is a personal trade name of Joseph Alfie

Following his studies in Finance at the John Molson School of Business, Joseph built his investment advising practice catering to high net worth business owners and professionals from the ground up. As a Certified Financial Planner, clients can count on his extensive knowledge of investment management, estate and tax planning, to guide them through the different stages of their retirement plan.

Joseph's investment style is based on strategic asset allocation to ensure that portfolios can weather the volatility of the markets. In 2015, he partnered up with Marcello Naccarato and David Deckelbaum and founded Myriad Private Wealth, operating under the HollisWealth banner, and opened their office nestled in the heart of Old Montreal. In 2016, Joseph was named top 25 up and coming advisors in the country. When Joseph is away from the office, he enjoys training, basketball, tennis, travelling and giving his time back to charitable organizations.