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LEARN MORE ABOUT "STOCK INCENTIVE AND BENEFIT PLANS: HOW THEY FIT WITHIN A REAL WEALTH MANAGEMENT PLAN" WITH MASTER OF CEREMONIES & SPEAKER KRISTIN RAMLAL.
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STOCK INCENTIVE AND BENEFIT PLANS: how they fit within a Real Wealth Management Plan

What risks does one bear maintaining a concentrated single-stock equity investment as a result of employer stock incentives and/or stock benefit plans? Find out more in this informative session that will look at the common types of stock incentives, purchase plans and notable stock incentive plan trends. Discover the Financial and Investment planning considerations including concentration risk, tax implications, and retirement and estate planning considerations.

Kristin is a proud young professional woman in wealth advisory, with over 15 years' experience in the financial services. Her experience includes Canadian/US personal banking and lending, retail and institutional investment account management, portfolio analysis/construction, security research and trading, and financial and estate planning. She is an IIROC Licensed Securities Specialist and has a growing passion for holistic wealth advisory. Kristin is a firm believer in the important of financial education and is committed to a multi-stakeholder approach to real wealth management.



KRISTIN RAMLAL
PFP, CIM, FCSI
SECURITIES SPECIALIST AND
CREDENTIAL QTRADE
ADVISOR

MASTER OF CEREMONIES ON
DAY 1 AND DAY 2 SPEAKER
AT DAC

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Agenda

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