

WEALTH & RISK MANAGEMENT ADVISER OF THE YEAR

DAVID LUSH, CFP

President of ClearWater Private Wealth & Senior Investment Advisor with Aligned Capital Partners Inc.

ABOUT DAVID LUSH

Based in Calgary, Alberta, David Lush has been helping clients with retirement planning, wealth & risk management, tax planning, estate planning and financial management for over three decades.

As a Certified Financial Planner (CFP) he has held a wide range of senior management positions at various firms, including President, Head of Private Wealth, Vice President Western Canada, Managing Director and Division Director.

David believes connecting well with clients and fully understanding their priorities is vital to maximizing wealth management solutions' effectiveness. His extensive industry experience and the network of highly competent and skilled people he works with put David in an excellent position to provide tailor-made wealth management solutions. Each plan is specifically designed to perfectly fit within the discussed objectives of each one of his clients.

In addition to professional successes, David and the ClearWater Private Wealth team also like to stay involved and give back to their local community. Combining his love for hockey and community service, David has previously acted as one of the Calgary Flames ambassadors, the former co-chair and co-founder of the Calgary Flames Ambassador's Celebrity Charity Poker tournament, and also worked on the committee of the Calgary Flames Alumni Charity Golf Tournament.

David has also done some truly inspiring work for local charities. He has worked closely with groups such as the Impact Society of Calgary and Robb Nash Foundation. He has held positions such as co-founder of the YWCA Slats & Friends Charity Golf Tournament for the Women's Shelter in Banff, President of Okotoks Minor Soccer, and national board member of the Starlight Foundation. His charitable involvement has helped fundraise over \$5 million for deserving charities.

FIRM PROFILE

Wanting to build upon his financial planning practice and create a specialized team, David established ClearWater Private Wealth Inc. ClearWater Private Wealth strives to customize the financial planning experience to suit each of the clients individualized needs. By understanding that no two client experiences are identical, ClearWater assesses you and your family's complete financial picture to ensure your resources are funding your highest priority goals first.

Through their relationships with IDC World Source and Canada Life, David and his team are able to provide both life, and accident and sickness insurance products to clients. Their partnership with Aligned Capital Partners Inc. also permits them to offer a robust and innovative financial services platform that not only services clients excellently but puts their needs and interests first. As a leader in the industry, Aligned Capital Partners Inc. serves on a range of industry and regulatory committees to advocate how it believes investors should be treated.

The partnerships described above provide ClearWater Private Wealth with immediate access to the resources of Aligned Capital Partners Inc. and the back-office support of the National Bank Independent Network. David and his team's knowledge and connections aid them in providing their clients with a full spectrum of value-added financial services. We specialize in strategies that are suitable for families, professionals, entrepreneurs and high net worth individuals and place significant value on our long-term, trusted client relationships. Our team always strives to provide you with clarity and vision regarding your financial goals. By implementing our completely customizable 'Clear Formula' financial planning process, we can deliver personalized solutions to all of your financial aspirations and goals.