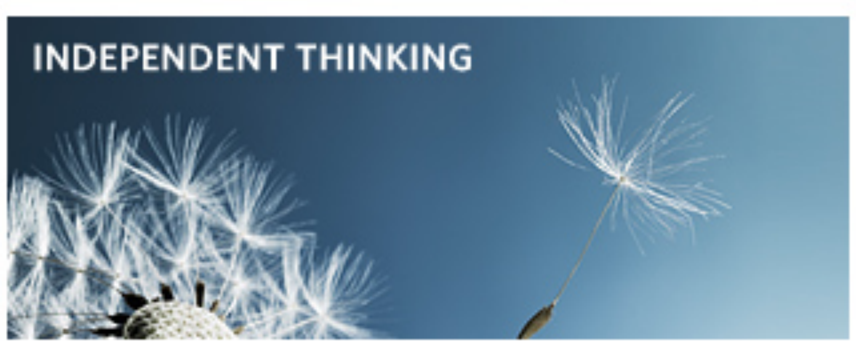
BNY MELLON
WEALTH MANAGEMENT | ADVISORY SERVICES

ABOUT US | WHAT WE DO | OUR APPROACH | CONTACT US



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THE SECRET TO SUCCESS IS
PUTTING YOURSELF SECOND.

OUR CLIENTS COME FIRST.

LEARN MORE

INDEPENDENT THINKING

GLOBAL STABILITY AND STRENGTH

PEOPLE ARE OUR GREATEST STRENGTH

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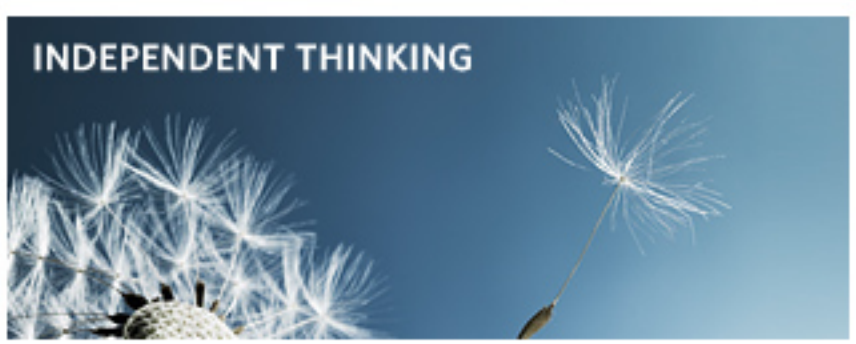
IN BUSINESS, SMALL AND PERSONAL
IS THE NEW BIG.

GET THE BEST OF BOTH.

LEARN MORE



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ABOUT US

Canada's investment counsellor of choice for wealthy individuals, families and institutions.

BNY Mellon Wealth Management's Advisory Services group is a leading provider of highly specialized investment solutions for many of Canada's wealthiest individuals, families and institutions. Entrusted with more than $4 billion in assets under management, we are distinguished by independent, objective thinking that is founded on deep analysis and research.

While Canada is our home, we provide access to exceptional investment solutions from around the world. Gaining strength from the global resources of BNY Mellon, we remain independent in our thinking, unbiased in our advice and transparent in our approach.

It is a conflict-free, "client-first" perspective, and it's how we help our clients achieve their unique goals.

Learn more about our **partnership with BNY Mellon.**

OUR ADVANTAGES

The advantages of working with us? We're designed to give every advantage to you.

By design, BNY Mellon Wealth Management's Advisory Services group is structured for one purpose: the investment success of its clients.

Ours is an independent, unbiased and research-driven approach. You can expect us to present and recommend investment options that are based on your specific needs and preferences, and that we believe will best mitigate your risk and create greater possibilities for you. Everything we recommend is based on your best interests, never our own.

We're also known for the quality of our people. Our team of professionals is distinguished by an unwavering focus on service, unparalleled experience and expertise, and a proven ability to deliver trusted guidance to help clients achieve their distinct financial goals.

Learn more about the exceptional quality and deep experience of our **management team** at BNY Mellon Wealth Management's Advisory Services.

MANAGEMENT TEAM

Exceptional people, relentlessly committed to wealth management.

Our people are unparalleled in their investment and wealth management expertise. They have deep knowledge and experience across all aspects of portfolio management and capital markets, and include CFA Charterholders, Chartered Accountants and MBAs among their educational and professional designations. Most important, you will not find people who more consistently, naturally and sincerely put client interests first.

Click photos for biographies

Anthony J. Messina
President

Michael Baker
VP, Investment Counsellor

Stephanie Hickmott
VP, Investment Counsellor

Lauren Davis-Landau
VP, Investment Counsellor

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OUR ADVANTAGES | MANAGEMENT TEAM | ABOUT BNY MELLON

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Click photos for biographies

Anthony J. Messina
President

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President

Short Bio Fusce tristiqueacc umsan est a mattis. Vestibulum pellentesque magna eget erat fringilla non sodales felilacinia. Etiam et ligulapsumpellentesque magna eget erat fringilla non...

View Full Biography

Stephanie Hickmott
VP,Investment Counsellor

Lauren Davis-Landau
VP,Investment Counsellor

ANTHONY J. MESSINA

Back to Management Team

PREVIOUS NEXT

Anthony J. Messina
President

Anthony Messina is chief executive officer of BNY Mellon Wealth Management's Advisory Services, Consectetueradip iscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue duis dolore te feugait nulla facilisi. Nam liber tempor cum soluta.

WHAT WE DO

We protect and grow your wealth with the same spirit that helped you create it in the first place.

Our clients have built their wealth through hard work, calculated risk taking, and exceptional planning and execution. And, more often than not, a sharp focus on their customers. We apply these same qualities in the service we provide each client.

Like so many people who choose us, BNY Mellon Wealth Management's Advisory Services is driven by a client-first focus and a commitment to exceptional service and results. We're built on a foundation of research and analytics. The objectivity and independence of our investment recommendations are engrained in our design: We're paid only by clients, not on commission or referral fees. Our people sit on your side of the table, conflict free–and deliver the best, thoroughly vetted investment solutions from around the world.

Learn more about **who we serve** and **our services**.

WHO WE SERVE

Canada's most successful people and institutions partner with us to help them stay that way.

We serve individuals and families, many of whom own or have sold an entrepreneurial business. They want to preserve and grow their wealth and leave a legacy for future generations. They come to us for sophisticated counsel and exceptional solutions to help ensure their investment success.

We serve institutions, including endowments, foundations and pension funds. They are typically seeking exceptional investment solutions, transparent thinking and recommendations, and clarity of reporting. Whether they need a strong partner to help them execute their own investment thinking, or an advisor to help them analyze research and set strategy, BNY Mellon Wealth Management's Advisory Services is the clear, compelling choice.

Ultimately, each client is unique. They trust us to embrace their goals, marshall the best local and global resources to meet them, and collaborate well with any other advisors they decide should sit at the table with us.

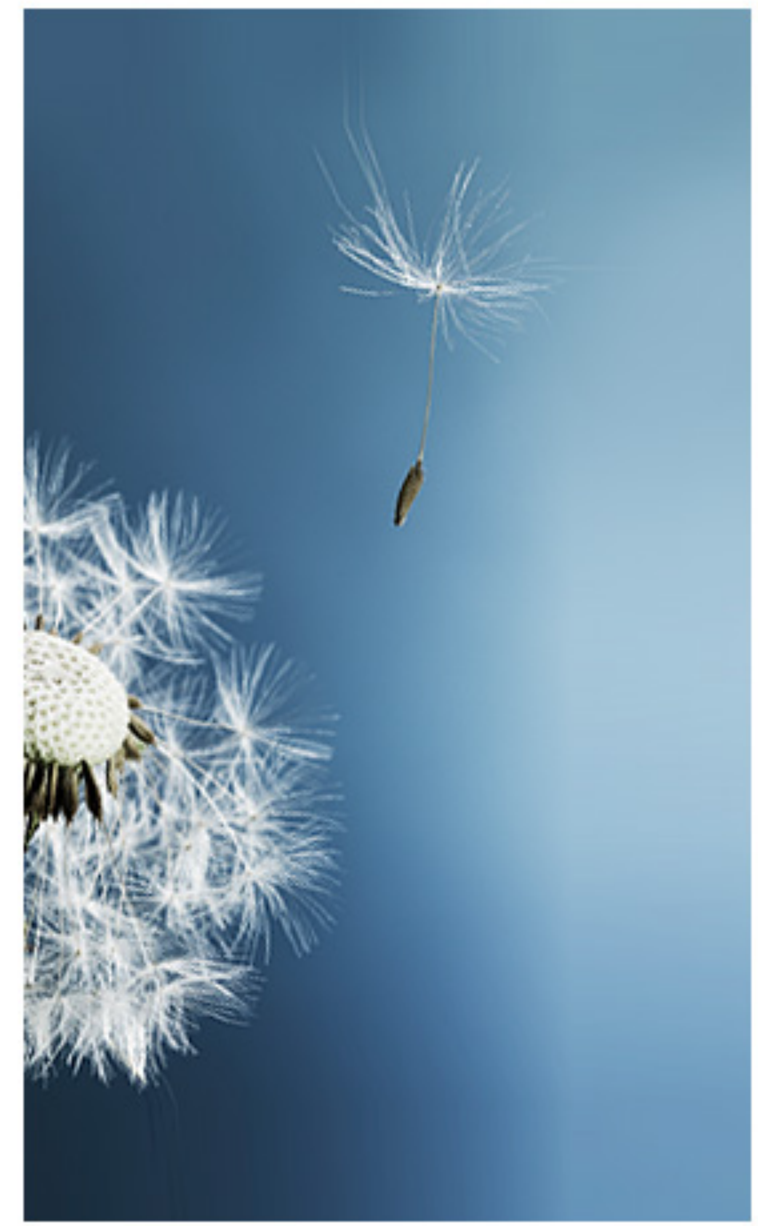
OUR APPROACH

For us, success starts with a clear and deep understanding of one subject: you.

As a client of BNY Mellon Wealth Management's Advisory Services, you'll have investment strategy designed by a seasoned Investment Counsellor who has a commitment to rigorous research and highly personal service. Together, you'll agree on a roadmap–your Investment Policy Statement–which ensures a clear understanding of your objectives and our specific recommendations for meeting them. Managers are then selected with total objectivity for a match between your unique goals and their unique strengths.

All that, combined with careful oversight and open, transparent, ongoing communication, will power your investment strategy like no one else can.

Learn more about our approach: Select **Service Approach**, **Investment Policy Statement**, **Manager Selection** and **Implementation and Management.**



SERVICE APPROACH

Our investment counsellors have one objective: their clients' success.

Your relationship is led by one, dedicated Investment Counsellor. He or she will create a customized strategy grounded in an intimate understanding of your needs. Your Investment Counsellor then assembles a team to support your relationship and assure that you're equipped with our best, most objective insights and ideas.

You'll have a close working partnership with your Investment Counsellor. This senior professional will regularly review your goals and changing circumstances, aligning the approach and resources to best address your evolving goals and needs–and the ever-changing risks and opportunities of the global markets.

While the best thinking and experience of the entire organization will be applied to your goals, this one person is directly accountable for your satisfaction and success.

Next: **Investment Policy Statement**

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Most clients come to us after someone they know and respect recommends us. They hear we're different. Research-driven, analysis-driven, objective and transparent. And that "clients first" is built into our operations and our culture.

Have a meeting with us and put us to your own tests. We're ready when you are.

BNY Mellon Wealth Management's Advisory Services
200 Wellington Street West, Suite 300
Toronto, Ontario M5V 3C7

For more information about BNY Mellon Wealth Management's Advisory Services, please contact:

Barbara Zubek
T (416) 840-8013
E **barbara.zubek@bnymellon.com**

OR

Jo-Ann Conrod
T (647) 426-7147
E **joann.conrod@bnymellon.com**

Send us your questions

First Name | Last Name
Email Address
City (optional) | Province (optional)
Phone (optional) | Best Time to Call

Please write additional comments below (optional)

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