

# Investment Team

Deep and diverse investment management experience at your service



→ 45 years of experience



**Brent McLean**, Chief Investment Officer

**Highlights:**

- **CEO and Founder**, *McLean & Partners Wealth Management* (1999-2014)
- **Entrepreneur of the Year Finalist 2004 & 2006**
- **Founding Partner**, *Gordon Private Client* (1996-1999)
- **Senior Investment Advisor**, *Wood Gundy, BMO Nesbitt Burns* (1978-1996)
- Former Member of TEC Canada and Strategic Coach (1999-2015)
- BCom, University of Calgary



12 years of experience ←

**Ivo Ciurlizza, CFA**, Senior Research Analyst

**Highlights:**

- **Senior Analyst, Private Equity**, *Sandpiper Group* (2019-2021)
- **Senior Technology Analyst**, *TD Asset Management* (2018-2019)
- **Senior TMT Analyst**, *Greystone Managed Investments* (2012-2018)
- **Analyst**, *Kitsilano Partners* (2011-2012)
- **CFA Charterholder**
- BCom (Honours), University of BC



→ 11 years of experience



**Marko Skobo CFA, CBV**, Research Analyst

**Highlights:**

- **Associate Vice President**, *KPMG Corporate Finance* (2018-2021)
- **Associate**, *Deloitte Corporate Finance* (2015-2018)
- **Analyst**, *Paladin Capital Advisors* (2012-2015)
- **CFA Charterholder**
- **CBV Charterholder**
- BA Economics, University of Waterloo



1 year of experience ←

**Yaseen Merali**, Research Associate

**Highlights:**

- **Economist and Portfolio Manager**, *MRU Student Investment Fund* (2021-2022)
- **BBA Candidate**, *Mount Royal University*

