Me Diana Leopardi

Wealth and Estate Planner
Scotia Wealth Management

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BACKGROUND AND EXPERIENCE

As a Wealth and Estate Planner, Diana is responsible for providing advice and guidance to clients for their Will and estate planning strategies. Clients benefit from personalized strategies that align their investment, retirement, philanthropic, fiscal and estate plans to help safeguard financial well-being into the next generation and build lasting legacies. Member of the Quebec Bar since 2013, Diana completed her Masters' Degree from Osgoode Hall Law School at York University. She also holds two previous undergraduate degrees in Law and a Bachelor of Arts and Science with a Double Major in Political Science and Communications. Diana previously worked in tax litigation and corporate law before joining Scotiatrust in 2015.

BUSINESS APPROACH

Total Wealth Planning specialists work with you and your relationship manager to develop a Total Wealth Plan with a view to preserving your hard-earned wealth and creating new strategies for future success. The process starts with an in-depth review of your situation including your financial position, concerns, and short-, medium- and long-term goals. This enables us to conduct a comprehensive analysis of your entire financial situation, helping us to recommend a uniquely tailored wealth management solution.

ABOUT US

Scotia Wealth Management® is an innovative team-based approach to wealth management that addresses the entirety of your life —your family, your business, and your future—one facet at a time. Together with your relationship manager, our Scotia Wealth Management specialists bring their skills and expertise to the consideration of what you've accumulated—and how best to administer it through life's changes. From financial counsel on managing your wealth to careful contemplation of how to transfer it to future generations, it's your thinking, combined with our thinking, to create Enriched Thinking.®

To learn more about Total Wealth Planning, please visit scotiawealthmanagement.com

Scotia Wealth Management®