Chan & Mai Wealth Management team

Our Services

We are a team with 35 years combined experience in Wealth Management. We practice a life-stage approach. It begins with a thorough understanding of you and your family, and if necessary, we bring in other TD specialists to complement our advice. We offer personalized investment advice, tax-efficient strategies, trust, retirement, business succession planning and estate planning strategies. Your personal situation changes over time, therefore the financial plan will be continuously monitored and reviewed to ensure it is always up to date. Our career goal is to build a long term successful relationship and to help you to achieve your vision of success:

- Building net worth
- Implementing tax-efficient strategies
- Protecting what matters
- Leaving a legacy

Our Investment Philosophy

Integrity, transparency and accountability are the cornerstone of our business. We believe a tactical balanced approach can help provide growth and income with lower overall volatility and risk. Our fundamental philosophy is to provide you first-class services and a professional advice. We strive to balance risk and reward to help achieve your financial goals.

Our Team

Andrew Chan, BSc. CIM
Vice President | Investment Advisor | Certified Retirement Specialist

Andrew brings over 20 years of wealth management experience to his role as Vice President and Investment Advisor. He has completed the Canadian Securities Course (CSC), Life Insurance (LLQP), and Certified Retirement Specialist (CRS) as well as earned the Canadian Investment Manager (CIM) designation through Canadian Securities Institute. The financial market has a wide variety of complex products that can be intimidating to the average investor. Andrew is articulate and keeps things simple for his clients. Andrew's passion beyond family and work are cycling, golfing and is an audiophile.

Nicole Mai, BA
Investment Advisor | Certified Retirement Specialist

Nicole began her finance career in 2003. She specializes in holistic wealth planning services to high net worth private investors, business owners, and charitable organizations. She is experienced in various insurance and trust planning strategies. Nicole has completed the Canadian Securities Course (CSC), Life Insurance (LLQP), Professional Financial Planning Course (PFPC), and is a Certified Retirement Specialist (CRS). Nicole’s diverse background and experiences have equipped her well to meet clients’ divergent needs. In her spare time, she enjoys dancing, reading and travelling.