



Peter Lewis

Associate Portfolio Manager and Senior Investment Advisor

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Peter Lewis helps families align their investments with their broader life goals, combining analytical precision with genuine care. A Chartered Financial Analyst (CFA®) and MBA graduate, Peter focuses on portfolio design, risk management, and multi-generational wealth planning. His strategic insight gives clients an in-depth view of both the process and the purpose of their financial journey.

Peter is an active volunteer for the Power of Hope Committee, reflecting a strong commitment to community involvement. Peter and his wife Sarah moved to Kingston in 2014 where they now reside with their children. Outside of the office, he is a car enthusiast who enjoys spending time with friends and family.