

# Doll Block new home of WealthBridge

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WealthBridge Group partners, from left, John Davis, Robert Savin and Patrick Floreani in their new digs in the historic Doll Block in downtown Calgary.

**Photograph:** Colleen De Neve, The Calgary Herald

CALGARY - The Doll Block, which was saved and incorporated into the Hyatt Calgary Hotel-Telus Convention Centre development, has to be one of this city's architectural treasures. Designed by Calgary architects Dowles & Michie and built in 1907, it boasts a gorgeous facade of alternated brick and stone showing decorated arches and third storey half-round oriel window. This week it welcomed a new tenant, proud to show off its space overlooking Stephen Avenue Walk and the piece of bare original stone wall framed in the board room.

The company, WealthBridge Group, is also new and rather unique in that it offers a range of integrated services in comprehensive wealth management including discretionary investment management, tax planning and preparation and financial planning services. It has been founded by three partners who left large institutions to pursue their ambition of creating an independent wealth management firm dedicated to providing clients with the highest level of unbiased personal service.

John Davis brings to WealthBridge a diverse background of professional, community and athletic achievement. A player on the University of Western Ontario Mustang team that won a collegiate national football championship he played with the Edmonton Eskimos in the early 1990s. He worked with National Trust before joining Corporate Planning Associates (CPA) in 1998 as senior vice-president with the mandate to establish its Calgary office and over the following 12 years led a professional financial team and built up a

client base that included some of this city's most prominent executives and their families. He was recognized with a Top 40 under 40 award in 2007 in recognition of his outstanding business and community contributions that included being cabinet co-chair with United Way, chair of the board of St. John's School of Alberta, and chair of the environments grants committee of Calgary Foundation. Today Davis sits on five private foundation boards.

Robert Savin joined Canadian Wealth Management (CWM) in 2000 as senior financial adviser. In 2002 he established and became president of CWM Funds, the following year he was made a partner of CWM and was appointed president of CWM Group in 2005. Savin specializes in investment management, planning and complex trust and estate planning. Also a Top 40 under 40 award recipient, he has served as a past-chair of the YMCA and board member of St. John's School and the Calgary Philharmonic Orchestra.

Patrick Floreani has 18 years experience in financial services and his primary duty is to run and manage its investment counsel division. He began his career with Canada Revenue and in 1996 joined CWM as a portfolio manager, made partner in 2002 and became chief investment officer of CWM Counsel and CWM Funds, responsible for overseeing the management of \$600 million in client assets.

Corporate Planning Associates was sold to the Bank of Nova Scotia and Canadian Wealth Management is now owned by Societe Generale. All three WealthBridge managing directors felt the same motivating desire to return to working with a smaller entity where they and their staff were able to conduct business face-to-face with high net worth clients and after six months designing the company and recruiting an exceptional team the company was officially launched on the second and third floors of the Doll Block this week.

Davis says that although it will make good use of technology there will always be a live body answering the phone and offering "the dedication your wealth deserves" looking forward to developing custom-tailored portfolios and strong partnerships with its clients.

David Parker appears Tuesday, Thursday and Friday. [Read his columns online](http://www.calgaryherald.com/Business) at <http://www.calgaryherald.com/Business>. He can be reached at 403-830-4622 or e-mail [info@DavidParker.ca](mailto:info@DavidParker.ca)

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