



Robert Montague, CFP®, CIM®

Associate Portfolio Manager

Robert joined IAIC in 2019, as part of the IAIC's Investment Counsel Portfolio Management Support Services (ICPMSS) team. His primary responsibilities are to onboard new clients and provide client relationship services, such as regular portfolio and market reviews and updates.

Since entering the wealth management industry in 1995, Robert has obtained his Certified Financial Planner (CFP®), Chartered Investment Manager (CIM®) and other securities licenses and accreditations. He is a member of FP Canada and the Toronto Society of Financial Analysts.

Prior to joining IAIC, Robert worked at a boutique investment dealer, a major Canadian Bank and top Canadian Insurance company in the capacity of an Investment Advisor & Branch Manager, Compliance, as well as a Senior Financial Planner.



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