



CROSS-BORDER WEALTH MANAGEMENT

is naturally complicated. We have the experience and expertise to help guide you through the process.

April Dorey Hartwig has been helping families manage their wealth through the transition as they move between Canada and the US since 2008 and advising Canadians since 1999.



April is licensed in Canada and the US. Links to my profile on the SEC and FINRA here:

<https://adviserinfo.sec.gov/individual/summary/5528668>

<https://brokercheck.finra.org/individual/summary/5528668>

We work closely with clients to translate their personal needs into a strategy for their cross-border accounts.

We can advise you on some of the most common legislative and taxation challenges you will face.

Raymond James (USA) Ltd. protects your account as a member of The Securities Investor Protection Corporation (SIPC). <https://www.sipc.org/>

We can provide you with access to your Canadian and American wealth all from one place.

Multi-currency and global investing accounts for US residents.

Raymond James (USA) Ltd. is a Canadian-based U.S. registered investment firm offering specialized advice to Americans living in Canada and Canadians living in the U.S. for their cross-border investment needs.

Canadian and US currency accounts for Canadian residents.

Cross-border financial planning support with Raymond James' legal and estate planning expertise.