Corporate Biography

Doug Carroll BBA JD LLM(Tax) CFP TEP
Tax & Estate Specialist
Aviso Wealth Inc.

Doug Carroll is a *Tax & Estate Specialist* with **Aviso Wealth**, a national, integrated financial services company serving the wealth management needs of virtually all of Canada's credit unions, as well as a range of independent financial organizations.

In his role, Doug researches case law, legislation and financial media, in order to prepare support material for financial advisors and their clients. Through published articles, financial industry speaking engagements, public seminars and in-person consultations, he assists advisors and their clients who have complex needs, particularly business owners.

He has held roles in the life insurance and investment industry at both the supplier and distributor levels. Combined with his hands-on experience running an estate planning law practice, he's able to offer practical insights in personal wealth matters.

Apart from his legal training, Doug began his working life as a professional conference planner, and has organized and spoken at hundreds of events since the 1980's on financial planning matters, particularly on tax-informed insurance and investment issues.

He contributes to and has been quoted in financial industry media including Globe & Mail, National Post, Toronto Star, Montreal Gazette, BNN, CTV, Global TV, TVOntario, 680News, Advisor.ca, Advisor's Edge Reports, Investment & Insurance Journal, Morningstar, Investment Executive, Advocis Forum, Sirius XM Radio, Daily Hive, & Yahoo Finance.

Doug holds a Bachelor's degree in business administration (BBA), a juris doctor (JD, the equivalent of LLB), and Master of Laws (LLM) with a specialization in taxation. He is also a Trust and Estate Practitioner (TEP) and a Certified Financial Planner (CFP), and previously sat on the Board of Directors of the Financial Planning Standards Council, the overseeing body for CFP professionals in Canada.

Professional qualifications aside, Doug gets the greatest satisfaction when people say he … "***actually speaks English when he speaks law***."