

Your Dedicated Wealth and Investment Team

At the Bird Moore Advisory Group, our relationship with you is the key to offering you truly tailored wealth strategies. The insight we gain from working with you is the basis on which we design your investment and wealth plan. By building a trusting and long-lasting relationship with you, we can better help you plan for the long term and manage your wealth successfully for generations to come.

**Dane Bird**

Vice President, Investment Advisor,
Life Insurance Advisor,
Certified Retirement Specialist
T 250 717 8110
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Dane has spent his career helping individuals, families and businesses protect and grow the wealth they've worked so hard to achieve. His expertise lies in investment research, stock selection, asset allocation and wealth planning. He is dedicated to providing all-encompassing wealth and estate-planning strategies to his clients, and can offer them insurance and annuity-based solutions when beneficial. Dane serves clients primarily throughout the Okanagan and Kootenay area and is also licensed across BC, Alberta, Ontario, Saskatchewan and Arizona.



Brandon Moore, CFP, FMA, FCSI
Investment Advisor,
Life Insurance Advisor,
Certified Retirement Specialist
T 250 470 3023
brandon.moore@td.com

Brandon brings nearly 15 years of industry experience to the Bird Moore Advisory Group. In partnership with Dane, Brandon provides customized wealth and estate planning solutions to their high-net-worth clients, who have unique and complex needs and goals. He has obtained the Certified Financial Planner (CFP®), Financial Management Advisor (FMA) and Fellowship of Canadian Securities Institute (FCSI) designations. He specializes in in-depth technical analysis and has completed the Technical Analysis Course.

**Lynn Gordon**

Sales Assistant
T 250 470 3042
lynn.gordon@td.com

Lynn and Jessie have over 20 years of combined experience in the financial services industry. They strive to uphold the highest level of client service and are responsible for the operational aspects of the practice. Together they support Dane, Brandon and their clients with all administrative matters, order execution, and reporting and are extremely knowledgeable in the areas of taxation and registered plans.

**Jessie Chatham**

Sales Assistant
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Bird Moore Advisory Group

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