



TEAM JACKIE PORTER

# Meet Our Team

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Jackie Porter

## STRATEGY AND MARKET WATCH

[askjackie@cartewm.com](mailto:askjackie@cartewm.com)

'The Cheerleader'

Jackie is looped into all decisions and provides strategic oversight. She collaborates on all financial plans and her primary focus is to monitor and manage your portfolio.



Jody Euloth

## ONBOARDING & CLIENT FEEDBACK

[jody.euloth@askjackie.ca](mailto:jody.euloth@askjackie.ca)

'The Connector'

Jody takes care of new client inquiries, onboarding and reviews client feedback. She wants to hear from you about what is going well and how we can improve.



Jin Lee

## FINANCIAL PLANS

[jin.lee@askjackie.ca](mailto:jin.lee@askjackie.ca)

'The Designer'

Jin Lee is our financial planning and strategies lead. Jin works with clients to build comprehensive financial plans that bring clarity to client's financial situations and build confidence.

SWIPE UP TO LEARN MORE





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Parthik Mehta

## OPERATIONS MANAGER

[parthik.mehta@askjackie.ca](mailto:parthik.mehta@askjackie.ca)

'The Team Engine'

A self-starter who is always ready to assist every department of the team to excel in their goals. I possess the ability to perform efficiently in changing environment, challenges, deadlines and priorities.



Khushi Gupta

## CLIENT SOLUTIONS SPECIALIST

[khushi.gupta@askjackie.ca](mailto:khushi.gupta@askjackie.ca)

'The Secret Weapon'

My goal is to provide you with excellent service and RESULTS!

You can also reach out to me to schedule meetings, update banking and beneficiary information and make changes to your policy.



David Nguyen

## ADMIN ASSISTANT

[david.nguyen@askjackie.ca](mailto:david.nguyen@askjackie.ca)

'The Matter Catcher'

Have any problems questions or concern? No matter how big or small your question is, I am here to help. Reach out to me if you have any question regarding your investment account with Team Jackie Porter and build confidence.

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Feyi Olojo

## PR & MARKETING

[info@askjackie.ca](mailto:info@askjackie.ca)

'The Publicist'

Planning and executing TJP's social media vision to drive brand discovery and client engagement via social media. I work with operations and sales teams to drive system improvements and convert social engagement to client acquisition.