

## **Barry McNulty**

Widely regarded as an expert on transition planning, Barry McNulty is the author of the book, *The Transition Coach*. He has also co-authored a book published by Thompson Publications which is used as a guide by the Canadian Association of Financial Planners. Barry has also written hundreds of articles on financial and practice planning issues for dentists.



Barry, along with Dale Tucci of Tucci Management Consultants, created the transition planning seminar, *Planning For Tomorrow: How to work out of choice, not necessity*. Barry has also lectured extensively throughout the country at events sponsored by the Canadian Dental Association, the Ontario Dental Association, Ash Temple, Alpha Omega and the Bank of Nova Scotia's professional division.

Barry is among the most accredited Financial Planners in Canada. He has held key positions such as vice president of a U.S. bank affiliate, vice president and director of a full service investment firm and president of a fee-for-service financial planning firm. Barry has also served on Ryerson University's advisory board for its financial planning curriculum and in various capacities for the Canadian Association of Financial Planners, including several years as National Director.

Barry McNulty is a co-author of the book entitled *The Canadian Business Owner's Guide to Financial Independence* (ISBN 1897178166) available at [Chapters.ca](http://Chapters.ca)

## **Mark McNulty**

Mark has been a financial planner and advisor for a number of years. Mark joined the firm in 1996 after finishing University and immediately began his focus on financial planning for dental professionals.



Mark attained his Certified Financial Planner (CFP) designation in 2001. In 2003, he completed the Canadian Investment Manager's (CIM) program, the highest level of investment education within the Canadian Securities Institute. The CIM prepares Mark to manage mutual funds, to become a portfolio manager, and/or take discretionary management over individual trading accounts as a portfolio manager. Mark has also successfully completed additional courses in tax, estate and retirement planning, investment analysis and management, business and family law, and insurance.

Mark McNulty is the co-author of the book entitled *The Canadian Business Owner's Guide to Financial Independence* (ISBN 1897178166) available at [Chapters.ca](http://Chapters.ca)

### **Raymond James, The McNulty Group Disclaimer**

Statistics, factual data and other information presented at the seminar are from sources believed to be reliable, but accuracy and completeness cannot be guaranteed. It is furnished on the basis and understanding that Raymond James Ltd., Mark McNulty and Barry McNulty would not be under any liability whatsoever. The seminar is for informational purposes only. It is not meant to provide legal or tax advice; as each situation is different, individual should seek advice based on their circumstances.