

About Sagicor Wealth Management

Sagicor Wealth Management involves a holistic approach towards wealth accumulation and generation on an individual client basis through the establishment of bespoke portfolios to meet specified client objectives.

This revolving process is centered around the client and involves a multilayered structured process, which hinges on a comprehensive understanding of the client's total wealth, desired return objectives and risk tolerance. Once the gap analysis is completed, our wealth managers and investment specialists establish the wealth plan, which serves as the road map to closing the gap.

Our robust assessment includes the determination of the client's ability and willingness to take the optimal level of risk, the client's current financial circumstances, any liquidity needs, tax considerations and client's stage in the investor lifecycle. The product of the thorough assessment is the establishment of a properly defined Investment Policy Statement, which guides the portfolio construction. Ongoing periodic reviews ensure that the investment process is up-to-date and serves to keep the investment portfolio on target to achieving the desired long-term results.

Meet the Wealth Management Team

Dexter Moe - Vice President, Investment Management Services



Mr. Dexter Moe joined Sagicor in 1997 and brings over twenty years of investment management experience to his role of Vice President, Investment Management Services at Sagicor Asset Management Inc. In this position, he is responsible for developing and implementing the investment management strategy for life insurance, pension and asset management portfolios.

Mr. Moe and the team at Sagicor Asset Management are strongly committed to providing a wide range of investment solutions for individual investors as well as local, regional and international institutions.

Dexter is a member of the Management Investment Committee (MIC) and has served as Chairman of the Asset Liability Management Committee (ALCO). Dexter represents Sagicor as an executive member of a number of joint venture committees and has participated in several investment forums.

Dexter has a B.Sc. (Hons.) in Accounting from the University of the West Indies and an MBA (International Business and Finance) from Schulich School of Business, York University, Toronto, Canada. He holds the Chartered Financial Analyst (CFA) designation and is an Associate of The Chartered Governance Institute of Canada.

Samantha Johnson - Senior Wealth Officer

Samantha joined the Sagicor Wealth Management department in October 2021, having previously worked in Asset Management at CIBC FirstCaribbean Bank for 7 years where she was responsible for managing a portfolio of corporate and individual clients valued at approximately USD\$50M. Prior to that, she worked as an Accountant at another financial institution for 18 years. During the 25 years before joining the Sagicor team, she also held the



position of Broker/Trader on the Barbados Stock Exchange where she gained a wealth of experience in investment trading and management.

Samantha holds a B.Sc. in Accounting from the University of the West Indies and successfully completed the 8th Eastern Caribbean Securities Market Certificate Program in 2005.

Our Process: Simple and Client Focused



Why Sagicor Wealth Management?

We are committed to providing customized portfolio management and risk assessment to you our clients by offering the highest standards of professionalism.

benefits

Financial security brings independence and a peace of mind. Well-informed and articulated decisions can help you reach your goals faster and with less costly mistakes or financial losses. Pursuing your goals towards your golden years in retirement should be achieved through wise financial decisions.

Investment opportunities are often missed due to lack of knowledge of their existence or poor timing. Tapping into these opportunities can result in rewards that can have exponential financial impacts. Our team will work with you to determine your level of risk tolerance, your goals and the timeline to achieve these goals.

related products

Investment Management

The services of our portfolio managers include personalized assistance for investment solutions, one-on-one meetings with clients and foundations for the Wealth Management divisions, as well as trustee, directorial, and staff sessions for corporate clients. We provide information regarding trends in the global markets and ensure clients are sensitized to the risks and rewards of investing.

Fixed Income Trading

If you have a fixed income instrument for trade or wish to acquire one, we can help you add existing government and/or corporate bonds to your portfolio.

Equity Trading

Trading on any Stock Exchange may seem like a daunting task for the new comer to the market or simply for the curious. It does not take a large sum of money to begin investing and our qualified brokers can guide you through the Bull and Bear markets to assist you in achieving your financial goals.