



HARBOURFRONT
WEALTH MANAGEMENT



Tracey Lundell, BA, CIM®

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Tracey Lundell is a Senior Investment Advisor located in South Surrey, serving the Lower Mainland. Tracey provides a full-suite of wealth management services to her clients, including tax, investment and wealth planning. Tracey's dedication to exceptional client experiences and innovative financial strategies are the foundations of her business.

She has been providing her clients with innovative wealth management solutions for over 31 years. Tracey's clients include business owners, non-profit organizations, executives and pre-retired/retired individuals, who require an extra level of attention and specific industry knowledge to truly look after.

Tracey was born and raised on Vancouver's North Shore and is pleased to be serving clients in BC, Alberta, Ontario and Nova Scotia. She loves to read, cook and spend time outdoors – hiking, camping, kayaking. Tracey enjoys constantly expanding her education. In addition to her double major from UBC in English Literature and Political Science, Tracey is an investment and fixed income specialist holding a number of industry certifications including the Chartered Investment Manager designation.

Tracey has spent her life volunteering with different charitable organizations across Canada, and continues to be actively involved in a wide range of charitable and community organizations including: Ronald McDonald House – BC & Yukon, UBC Medical School Diabetes Research, YWCA of Vancouver, Vancouver Seniors Service Experts, Burnaby Seniors' Resource Society, Semiahmoo Seniors' Planning Table, Age SENSE South Fraser, Advocacy for Aging BC, Mentor for Forum of Women Entrepreneurs and Facilitator for Junior Achievement of BC.

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