

THE JOHNSON LEGACY REPORT

Building Trust for Generations



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AND THE WINNER IS...

At Johnson Legacy, we know how to make people smile. Our culture of caring philosophy is clear in the many community-based initiatives we lead or take part in throughout the year. All of that hard work caught the attention of the City of Kelowna.

We announced in last month's Johnson Legacy Report that we were one of three finalists, alongside Royal Bank of Canada and CapriCMW Insurance, for the Corporate Community of the Year Award for medium to large business.

The Winner: Raymond James – Kelowna Corporate Branch



You can imagine how excited we were to win this prestigious award especially alongside two heavy hitters like RBC and CapriCMW Insurance. Congratulations to both of them for their nominations.

That night was made even more special as we presented Kelsey Serwa with a check for almost \$59,000 dollars to her KSER Scholarship Fund which was raised at our annual Christmas In November event.





“I’m over the moon ecstatic and feel incredibly grateful for Raymond James to choose the KSER Scholarship Fund as their charity of choice from this year’s [2018] Christmas in November fundraiser,” said Serwa. “They have been incredibly generous throughout our community, donating volunteer hours and funds to countless charity organizations.”

Kelsey Serwa was also a nominee and winner of the Female Athlete of the Year Award, which, given all of her accomplishments came as no surprise to us.

“Not only am I thrilled to win this prestigious award within a community of world-class athletes, I am also thrilled to see Raymond James get the recognition they deserve for the impact they’ve made right here in the Okanagan,” said Serwa about their awards.

Congratulations to all nominees and winners of the 44th Kelowna Civic & Community Award.

Market Pulse:

Major Stock Indexes	Level/Price	YTD Return Ending Apr 30th/19
S&P/TSX Comp	16,581	15.76%
S&P 500 Comp	2,946	17.51%
Dow Jones Industrial Avg	26,593	14.00%
Major Bond Index		
Dex Universe	1,091	3.80%
Commodities		
Crude Oil - WTI (US\$/bbl)	\$63.50	39.84%
Gold (US\$/oz.)	\$1,283	0.12%
N. Gas (US\$/MMBtu)	\$2.60	-11.50%
Currency		
Canadian Dollar (CAD/USD)	\$0.75	1.77%

Source: Bloomberg.

Personal Updates:

As you may know, Lori is on the event planning and fundraising committee for the Kelowna Art Gallery and Johnson Legacy Wealth Management is the presenting sponsor for the Appetite for Art fundraising event on May 11. Lori is pleased to announce that in April she was selected to go on the board of directors for the Kelowna Art Gallery. She welcomes the opportunity to expand her experience and knowledge base in this realm while giving her time to such a worthy organization.

As much as Jay and the family have enjoyed all of their winter activities (skiing, cheerleading, dance and hockey), they had a great spring break in Maui. A couple of highlights were going to a Willie K concert and going zip-lining for the first time. As previously mentioned, 2019 will mark the sixth year Jay will be participating in the [Ride to Conquer Cancer](#) benefiting the



BC Cancer Foundation. Thanks to the immense generosity of many of you reading this, in those five years Jay has personally raised over \$55,000 and the entire Team Raymond James has raised over \$460,000! Back in 2017, you may recall that Jay and a few other riders took on and completed the challenge of cycling across BC. The goal for this year will be to ride the 620km across Alberta between June 14 and 16. Let the training begin!

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