



Caribbean Financial Advisory Services

Solutions that work



**Caribbean Financial
Advisory Service (CFAS)
is committed to providing
solutions that work for
our clients.**

Our CFAS business centers around our clients' objectives. We design, transform, and execute bespoke solutions based on trusted relationships, deep industry knowledge, and professional experience.

Our solutions are created to be easily bankable when required and are designed to illuminate the implementation process.



**Our services are available to all
countries throughout the Caribbean.**

Services Available



FINANCIAL AND BUSINESS ADVISORY

Strategic and business planning continue to be core activities for any business. These activities may require an unbiased and expert perspective.



CORPORATE AND CAPITAL (RE)STRUCTURING

Optimizing the composition of your company's resources should be an iterative process that capitalizes on expert insights.



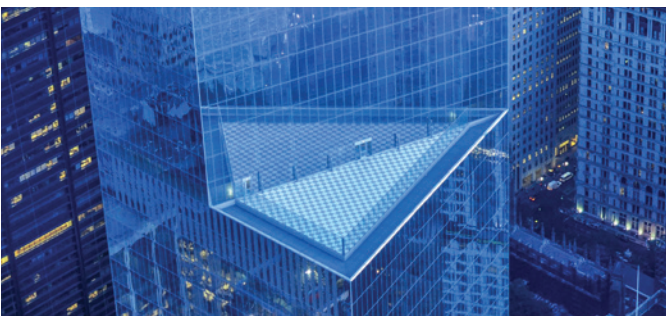
PROJECT FINANCING ADVISORY

These exclusive projects require innovative solutions in order to maximize the return on investment.



MERGERS AND ACQUISITION ADVISORY

Even though it is one of the quickest way to grow your company, it is often complex and requires technical support.



FUNDS ARRANGEMENT SERVICES

Determining and sourcing the right funding resources require having the right connections and providing innovative solutions that are tailored to your company's needs.



DEBT AND EQUITY FINANCING ADVISORY

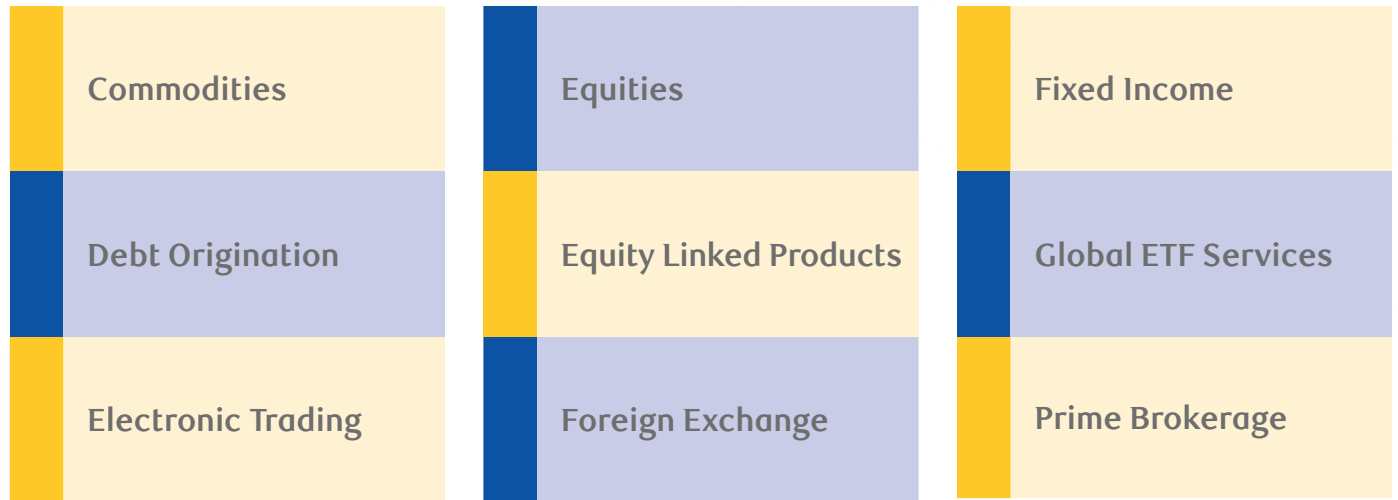
A broad institutional coverage and a customized marketing approach are necessary to achieve superior execution.

Global Connectivity

Our Global Markets Team is recognized around the globe as an innovative, trusted partner with in-depth expertise in capital markets, banking, and finance.

Our CFAS team can leverage the expertise of our global partners to deliver trusted insights and solutions for focused set of products and services to corporations, institutions, investors, asset managers, private equity, and governments.

Services:



Meet Your RBC Deal Team



Joel Phillips

Head
CFAS & Structured Solutions
RBC Merchant Bank (Caribbean) Ltd.

Joel Phillips stands as a seasoned professional, currently at the helm of Caribbean Financial Advisory Services and Structured Solutions at RBC. With a knack for inventive problem-solving, Joel excels in crafting creative strategies for intricate business challenges. A Fellow of the Association of Chartered Certified Accountants (ACCA) and as a Chartered Financial Analyst (CFA) charter holder, Joel seamlessly combines analytical acumen with a comprehensive understanding of financial expertise.

Joel's experience of over twenty years in the financial services sector, include overseeing significant transactions and crafting effective business strategies. His varied background, spanning diverse roles, showcases a skill set covering overall business operations, innovation, technology, and risk assessment. In his present leadership role at RBC, Joel channels his expertise to offer clients strategic insights and solutions. With a commitment to delivering value and tailored financial guidance, Joel positions himself as a trusted partner for clients seeking success in their financial endeavors.



Sinead Ellis

Vice President
Corporate Banking
RBC Financial (Caribbean) Ltd.

Sinead is a financial professional with over 10 years of experience and is responsible for driving and managing the Advisory Services at RBC. She has gained knowledge and experience from working at one of the multinational Big Four auditing and advisory firms and specializes in the Investment and Finance Industry.

With her expertise in banking, capital markets, and insurance audits, she has a proven track record of building strong client relationships and delivering high-quality work. Her experience includes financial statement reviews, compliance reports, and final accounts preparation for public regulators and clients. Sinead's expertise also extends to credit risk analysis, debt, and equity financing solutions, and providing banking and business advice to businesses, corporations, and sovereigns.

She holds a BSc in Accounting and Finance from Anglia Ruskin University in the UK and an MSc in Financial Management from Heriot-Watt University in the UK. She is a Chartered Accountant and a qualified member of ACCA, receiving a fellowship in 2022.

Meet Your RBC Deal Team



Keith Beneby
Vice President
Corporate Banking
RBC Royal Bank (Bahamas) Ltd.

Keith is an experienced banker having spent more than 15 years working in financial services. During that time, he has worked in wealth management, private equity, and corporate banking. He has demonstrated strong relationship building skills and the ability to deliver and execute complex solutions for his clients.

In his current role as Vice-President of Corporate Banking and Advisory Services Keith has responsibility for advising and structuring bespoke solutions to meet a myriad of client needs. This includes advice on financing solutions that optimize ROI, sustainable financing solutions, advise on M&A opportunities, company valuations, and capital market solutions to manage various market risk.

Keith holds a BSc in Finance from Dalhousie University in Canada. He is a Chartered Investment Manager with the Canadian Securities Institute.



Candace Jagbirsingh
Manager - Structuring,
Investment Banking

Candace is a career Investment Banker with 15 years of experience in Risk Analysis and Regional Capital Markets deal execution expertise. Throughout her career, she has managed the execution of transactions worth over the equivalent of USD 2 billion in local (T&T) and regional markets. Candace works closely with Legal Counsel and Regulators to secure required approvals and currently provides structuring, analytical, and transaction execution support for RBCMB's Regional Investment & Corporate Banking activities including the DC, EC & T&T. Candace specializes in Financial Engineering and Transaction Management, supporting both Origination & Syndication activities, and has garnered experience across multiple industries in multiple jurisdictions for both private and public sector institutions.

She holds a First-Class Honours BSc in Management (University of the West Indies) with a Minor in Finance. Her experience and training include completing MBA Essentials Courses in Analysis and Valuations of Real Estate Developments and Properties, Applied Corporate Finance and Valuations, and Risk Analysis, as well as the Treasury Risk Management Course with Prof. Heinz Riehl. Candace is also a registered representative with the Trinidad and Tobago Securities & Exchange Commission ("TTSEC").

Meet Your RBC Deal Team



Tamara Baptiste
Manager - Structuring,
Investment Banking

Tamara is a driven and experienced professional in the fields of Wealth Management and Capital Markets, with 15 years of experience in both international and local corporate environments. She has worked at both RBC and an American-based bank, managing portfolios for clients in Healthcare, Industrials, and Pension funds.

In her current role, Tamara is responsible for structuring financial products for local and regional corporations and sovereigns based on market conditions and financial models, as well as providing analytical and transactional support to RBCMB Corporate Banking. Tamara holds an Executive MBA with Distinction from the Arthur Lok Jack Global School of Business and a Bachelor's degree in International Business Management and Finance from Howard University in Washington DC.

She has also completed the level one exam of the Chartered Financial Analyst (CFA) designation and is a registered representative with the Trinidad and Tobago Securities & Exchange Commission ("TTSEC").

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