

Big or small, your business can benefit from knowledgeable advice from local experts.

# Meet David MacDonald Dip.BA

Local Business Relationship Manager  
Prospera Credit Union

Proudly serving: **Prospera Centre** | **Kelowna Mission Park** | **Penticton**

## What's my story?

I've been working in the financial industry for 30 years and I have a passion for financial literacy. I believe strongly in educating members so they're fully informed when making critical financial decisions about spending, saving, lending, and investing.

Our local business owners are the foundation of our community. They're our neighbours. They're our friends. They're our family. It's my goal to make a meaningful difference to their financial well-being by serving as an experienced, trusted advisor. I listen and I never judge. What's important is to learn, grow, and keep moving forward.

I find value in my everyday work through teaming up with so many talented people to helping entrepreneurs achieve their short-term and long-term financial goals. I love both sharing my own experiences and learning from the experiences of our members.

**Call or email and let's chat about how I can help you achieve your business goals.**



**David MacDonald**

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## What can I do for you?

My expertise lies in working with businesses at all stages, including new start-ups, growing enterprises, and retiring companies, to:

- Provide business financial advice
- Review business plans and financial statements
- Recommend the best use of excess cash
- Establish business operating lines and credit cards
- Facilitate business loans and commercial mortgages
- Access merchant services, payroll, and human resources solutions
- Arrange vehicle leasing and small business leasing for the transportation, construction, and oil & gas industries
- Refer to personal financial advisors for retirement planning, business protection, and succession planning