

Our Team

Claire Copp

President and founder of Securities Services and Trader ii Software

Claire created Securities Services in 1988 after discovering the DOS-based securities accounting program created by Peter B. Macdonald. In the 1990s Claire made significant improvements to the program including developing a transaction coding system that has been in use for over 20 years.

In 2008, the daunting task of developing an online version of the program began. In 2013, the “view only” access feature was added to enable clients to view their trading activity and reports wherever they are.

Charlotte Brown

Director of Securities Services, Trader ii Software and Corporate Assistant

Charlotte has over 15 years experience in both the public and private sectors of the corporate and securities industries. Her experience includes areas of corporate compliance, continuous disclosure, financing transactions and regulatory filings. Charlotte is also one of our Securities Accountants and Insider Filing Agents providing clients with accurate capital gains and loss reports and ensures that insider reports are balanced and filed in a timely manner.