

## Let's Connect!



## OUR MISSION

"To bridge the divide between economic disparities, through comprehensive financial education and equitable access to financial strategies, generally reserved for the wealthy."

### **OUR GOAL**

To improve the lives of each and every one of our clients through a comprehensive financial planning process - and it's not a 'one size fits all' kind of approach.

Creating custom plans, based on the goals, lifestyle, and situations of our clients, and ensure that they are on the road to financial freedom.

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#### **ABOUT ME**

After years of working in advisor sales at various large financial institutions, I realized that I wanted to work more closely with end clients. I'm passionate about helping Canadians improve their lives by helping them retire comfortably while creating and protecting intergenerational wealth. I believe that knowledge should be shared, and I take a very educational approach to working with my clients.

In my time away from work, I love spending time with my wife and son, getting outdoors, and all things to do with music. I also serve as a part-time member of the Canadian Army reserves and am an avid coffee drinker!