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*Customised Financial Planning Firm of the Year, Canada*

# CARING FOR CLIENTS

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Providing its clients with trusted independent and comprehensive advice, Caring for Clients is helping more Canadians attain financial security than ever before. Owner Rona Birenbaum tells us how



**T**hrilled to receive the award for Customised Financial Planning Firm of the Year, Canada, Rona Birenbaum said it will allow Caring for Clients to help more people as well as providing greater confidence in the industry as a whole.

"Certainly we appreciate the exposure the award offers and it can only help expand our reach to help more Canadians reach financial security whether through cash flow management, retirement and estate planning, tax planning, risk management or investment strategy. At an industry level, it can help counter negative stories in the media regarding failures which may unfortunately result in a general maligning of the financial advisory field."

Changing the firm's pricing model to fee-only planning 14 years ago, an innovation in the industry at the time, Rona explained that while Canadians are more in tune with financial planning today, the support, expertise and approach of Caring for Clients is more relevant than ever. "These days Canadians are seeking out objective

advisory options and are more comfortable paying for advice, understanding that 'free' advice is rarely that and never free at its core."

"That being said, our success is primarily due to the trusted advisor role that we play in our clients' lives. Our in depth knowledge of their circumstances coupled with our well-established professional network ensures that we provide support and direction in every aspect, becoming invaluable problem solvers for our clients."

Rona is most proud of the mission of the company which perfectly reflects the company name while providing a basis for a high level of customer service.

"I feel that a good business is one that measures success not by revenue or assets, but by the success their clients achieve, which this recognition allows us to broadcast."

"Our company name is our mission and therefore, our overriding philosophy and basis for our service culture. Developing the culture happened

naturally as a reflection of my personal values. I do believe that the culture of an organisation begins with the leadership.

"This culture has seen Caring for Clients be recognised industry wide as a firm with the highest professional integrity. It is an attribute that resonates strongly with potential clients."



**Contact name:** Rona Birenbaum CFP

**Email:** rona@caringforclients.com

**Tel:** +1 416 363 8500

**Web:** www.caringforclients.com

**Address:** 69 Yonge Street, 2nd Floor, Toronto, Ontario, M5E 1K3 Canada