



Caring for Clients is more than proud to announce that we were the 2016 winners of the Canadian Wealth Professional Award for:

BEST INDEPENDENT ADVISOR OFFICE - FEWER THAN 10 STAFF

This award is given to the outstanding advisor practice company, office or branch with fewer than 10 staff on a national scale. Criteria evaluated include growth, overall customer service, and stakeholder engagement.

As you see below, we were a relieved and happy group when our name was called out, the final award in an exciting evening. Maybe you may know that this was our third-time lucky? We were nominated three years in a row.

Award criteria such as growth, overall customer service and stakeholder engagement are tightly connected to our team effort to deliver top-notch service. We earn our near-100% retention rate by being consistently attentive, dedicated, and informed.

We also take pride in fighting above our weight class! As a single-office independent founded by our principal Rona Birenbaum, we were up against tough competition, several of whom were branches of much larger firms.

Thank you for being our loyal clients, for recommending us to prospective clients, and for working with us all year long to help make your financial plans come true.

