

WIP

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DETERMINED, INNOVATIVE AND SUCCESSFUL

MEET THE TEAM WHO IS TAKING OVER
THE WEALTH INDUSTRY, ONE CLIENT AT A TIME



RISKY BUSINESS?

Is Canada's real estate market too uncertain for investors right now?

THE INNOVATION GAME

Alignvest's Randy Cohen on why the industry desperately needs new ideas

DIGITAL REVOLUTION

The bond markets get a long-awaited infusion of modern technology

THE AWARD FOR **BEST PRACTICE INDEPENDENT ADVISOR OFFICE (FEWER THAN 10 STAFF)**

WINNER



Caring for Clients

FINALISTS

Danielson Group Wealth
Management of Assante
Wealth Management

Family Tree WealthManagement of
IPC Securities Corporation

The Lance Howard Group of IPC
Investment Corporation

Little Wealth Management Group
of HollisWealth

Lysnes Magreehan Wealth
Management of Canaccord Genuity
Wealth Management

Richie Group Private Wealth
Management of Investors Group

Tina Tehranchian Team of Assante
Capital Management

Western Canadian Brokerage Group

CONTRARY TO conventional wisdom that the dominance of the big banks is making wealth management much more difficult for smaller operators, Rona Birenbaum, the founder of Caring for Clients, is highly optimistic about the future. “Being an independent practice in

“I’m so excited to be recognized for all of the hard work and the value we have created over the past 17 years”

RONA BIRENBAUM
Caring for Clients

Canada is easier now than it was 17 years ago,” she says. “Consumers now are looking for objective, unbiased advice, and they understand that they don’t have to be dealing with the large institutions to get that. It’s taken a long time, but now we are where we need to be.”

That journey has led Caring for Clients to win this year’s award for Best Practice Independent Advisor Office (Fewer Than 10 Staff), a recognition that proves that the firm’s years of hard work are really coming to fruition.

Presenting the award was Carolyn Seaforth, VP of business development at Pinnacle Wealth Brokers, who says that while the major companies still rule the roost in the advisory business, there is plenty of room for smaller operators to thrive. “In smaller offices, the vital component is teamwork, and they are often the least recognized,” she says. “But with events like this, they can be in the spotlight where they deserve to be.”

The team at Caring for Clients



Carolyn Seaforth
Pinnacle Wealth Brokers