



YOUR FINANCIAL ADVISOR

Todd Benson

"I would like to be your financial coach. You can count on me to come up with a game plan that will help you reach your financial goals now, and in the future."



About Me

I have been in the financial services industry for over 11 years and specialize in providing clear, straightforward financial advice to families and small businesses.

Education and professional development are important to me. I completed my BA degree in Psychology at the University of Calgary in 1995 and my Certified Financial Planners - CFP designation in 2018.

Above all, I am a devoted family man living in Vernon, with my lovely wife and two children. I also enjoy endurance sports, specifically triathlon, and have competed in all distances up to and including Iron distance races.

My Approach to Helping You

I thrive on helping investors, just like you, **navigate** through the media hype and short term market noise by **focusing** on what is relevant and important to you.

Getting to know you well and understanding what you are trying to accomplish is critical in making meaningful recommendations so I spend time learning about your priorities. By focusing on your goals, I can help with strategies from saving for children's education to planning for a secure retirement as well as protecting what's important to you. It is my responsibility to make sure I bring relevant qualifications to the table to provide you the very best support.

Todd Benson, BA Psychology, CFP® Financial Advisor

- 11 years experience
- Bachelor of Psychology
- Certified Financial Planner®

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