



YOUR FINANCIAL ADVISOR

# Taylor Belanger

*"I offer my passion and expertise to provide you with a personalized approach to achieving your financial goals and dreams"*

## About Me

I have been in the financial services industry for 5 years, 3 of those years in the credit union system. I am passionate about finance and investing, helping my clients grow and protect their wealth by creating custom strategies and solutions designed to meet their goals.

I graduated with a Bachelor of Management with Honours (Finance) from the University of British Columbia in 2018. While at UBC-Okanagan, I was the president of the UBC Portfolio Management Group, a student-run investment club, where I found my passion for investment management and financial coaching. I have been a financial advisor for over 4 years, coaching my clients on lending and investments.

I was born and raised here in Vernon and I am a proud member of the Okanagan Indian Band. I love hiking in the Okanagan with my two border collies, Ducky and Stella, skiing up at SilverStar, and I am a die-hard Canucks fan.

## My Approach to Helping You

I am a strong believer in building long-term, trusted relationships, and developing a deep understanding of my clients' financial needs and goals. I will take the time to get to know you and your family to create a personalized investment or retirement strategy aimed at helping you grow and protect your wealth.

I analyze your full financial picture alongside your goals and needs when creating financial strategies designed to achieve your unique goals. I practice due diligence and proven methods that make achieving long-term financial success simple. All while coaching you through the complex world of finance through every stage of your life.



## Taylor Belanger BMgt (Hons) Financial Advisor

- 5 years of industry experience
- Bachelor of Management with Honours (Finance)
- Specializes in investment and retirement strategies

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