



YOUR FINANCIAL PLANNER

Taylor Belanger

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



Taylor Belanger, CFP, BMgt (Hons) Financial Planner

- **7+ years of industry experience**
- **Bachelor of Management with Honours (Finance)**
- **CERTIFIED FINANCIAL PLANNER® Professional**

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About Me

I am passionate about helping families and small business owners grow and protect their wealth by creating personalized financial plans designed to meet their goals. I have been in the financial services industry for over 7 years, 5 of those years in the credit union system.

I am a Bachelor of Management with Honours (Finance) graduate from the University of British Columbia and a CERTIFIED FINANCIAL PLANNER® professional. I have been a fully licensed advisor for over 6 years, coaching my clients on investing, retirement, insurance and estate planning.

I was born and raised here in Vernon, BC 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, risk management, retirement, insurance or estate plan 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 while coaching you through the complex world of finance, through every stage of your life.



*Mutual Funds and Segregated Funds provided by the Fund Companies are offered through Worldsource Financial Management Inc., sponsoring mutual fund dealer. Other Products and Services including financial planning services are offered through VantageOne Financial Corp.