



YOUR FINANCIAL PLANNER

Ian Paulson

"My goal is to ensure my clients have the education and tools they need to work towards their financial goals and dreams."

About Me

As a Financial Planner with VantageOne Financial Corp. I have a passion for and specialize in helping individuals, families, and small businesses identify what is most important to them and focus on creating simple, actionable, and practical plans to help them achieve their goals.

I graduated from Dalhousie University with a Bachelor of Commerce Degree and spent time studying abroad at the Copenhagen Business School. I completed my Certified Financial Planner designation in June 2024 and placed at the top of the FP Canada President's List for achieving the highest score in Canada on the exam. I started working in the Financial Services Industry while in university, and for the last 16 years, have held roles in both advisory and leadership capacities.

When I am not working, I enjoy spending time with my wife, daughter, and dog Sully. I also enjoy exercising my mind, golfing, staying active, and enjoying life in the beautiful Okanagan Valley.

My Approach to Helping You

I believe in a Comprehensive and Holistic approach to Financial Planning that incorporates protection, investment & retirement strategies, business succession, and estate planning. There are a multitude of financial solutions available to achieve a goal or solve a problem and I want to make sure you have a clear understanding of those presented to you. It is so much easier to make a meaningful choice when you understand the impact of the options available to you. Your best interests are at the forefront of every strategy and recommendation I make.

Working towards your financial future is much akin to planting a tree – "The best time to do so was twenty years ago, but the second-best time is now."

I look forward to working with you toward your goals.



Ian Paulson

CFP®, BComm

- 16 years of Experience
- Bachelor of Commerce Degree
- Certified Financial Planner®
- FP Canada President's List - June 2024

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*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.