



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"

About Me

I specialize in retirement planning, tax optimization, estate planning, protecting your family, and investment management for families, business owners, and retirees. As one of the few Indigenous Financial Planners in Canada, I also have experience and expertise with Indigenous clients and First Nations organizations.

I have been helping families, business owners, and retirees achieve their financial goals for over 8 years.

I am a CERTIFIED FINANCIAL PLANNER® professional. CFP certification is the world's most recognized financial planning designation and is considered the 'gold standard' for the profession. I have a Bachelor of Management with Honours (Finance) from the University of British Columbia.

My Approach to Helping You

As a Financial Planner, I will work with you over the long term to help you reach your financial goals. I can help you create, implement and modify financial plans to help you achieve lifelong financial well-being. 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.

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.



Taylor Belanger, CFP, BMgt (Hons) Financial Planner

- **8+ years of industry experience**
- **CERTIFIED FINANCIAL PLANNER® Professional**
- **Bachelor of Management with Honours (Finance)**
- **Indigenous and First Nations specialist**

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