Welcome to WLWP Wealth Planners

What We Do

Determining and implementing the financial strategy that will work best for you may feel like a difficult or even overwhelming process. Fortunately, we've spent decades assisting individuals, couples, families and businesses to create solid financial plans that allow them to define and achieve their goals.

The Process

Our extensive financial planning experience has led us to develop and utilize a proven, comprehensive process designed to identify your priorities, assist you in setting attainable financial goals, and then implementing strategies tailored to your specific needs.

Guiding Principles

Honesty and transparency are core values for our team. At every step of the way it's your needs that are the determining factor in our work and in our relationship with you.

It's important to us that you feel comfortable working with us and that the services we offer are right for you.

WLWP Wealth Planners will work honestly and tirelessly with you to ensure your experience with us is exemplary. We recognize, however, that not every investment firm is a good fit for every client. During our collaborative partnership if it is determined that WLWP Wealth Planners is not the right fit for you we will candidly let you know, and we will expect the same from you if you feel we're not the right fit.

OUR CLIENTS

We work with a variety of clients, from young investors seeking to build their portfolio, to experienced individuals pursuing strategies designed to protect the wealth they've already built. All our clients have something in common: questions. Whatever questions you have, we're here to provide answers, feedback and recommendations.

OUR TEAM

Our team is among the most highly credentialed teams in Canada and, with more than two decades of assisting individuals, couples, families and business owners to achieve their financial goals, we have the experience to back up the training.

OUR EXPERIENCE

Collective Experience: More than 100 years

Designations Held by Our Team: CFP®, CFA, CPA, CIM, CBV

OUR DUTY TO YOU

Portfolio Managers are held to a much higher standard by our industry's regulatory bodies. We have a fiduciary responsibility to act in the client's best interest.

To satisfy this standard we have a rigorous investment process that is implemented by a team of eight people who meet weekly to review investment selections.

WLWP WEALTH PLANNERS | iA Private Wealth™

help@wlwp.ca 1-800-782-2345 wlwp.ca

How Our Process Works

1. Before Your Financial Planning Meeting

Before our first meeting, you'll receive a letter providing an overview of the financial planning process. It will include a checklist of any documents we will need to review in order to thoroughly understand your current financial position.

2. Getting to Know You & Your Financial Planning Goals

Our first meeting will include an engaging discovery session that allows us to get to know more about you. All of the work we do is focused on you and your investment objectives, so we encourage you to ask a lot of questions and share information about your goals for the future.

3. Creating a Solid Financial Plan

Following our initial planning meeting, our team will create a plan for you based on your needs today as well as your long-term goals. That plan will be designed to take into account both "big picture" thinking as well as the many details critical to achieving long-term growth. We then come back together to discuss that plan and answer any additional questions you might have.

4. Plan Review and Monitoring

Once you are comfortable with the plan we have created for you, we will execute the plan and monitor it accordingly. You will consistently receive updates from us with key information about your accounts, and we'll also meet with you regularly to make any adjustments needed as your financial needs or goals change.

Our financial planning process has helped our clients work toward and achieve their financial goals for more than two decades.

It can work for you as well.

If you're ready to get started, contact us today.

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