Meet our Wealth Planning Professionals

A Complete Approach to Wealth Management.

Assante advisors pull all the pieces together to provide you with the big picture – an overall perspective that integrates the various aspects of your financial situation. Together, we will review and evaluate your current financial affairs to formulate a plan that encompasses your entire financial well-being, from investments and insurance, tax and estate planning, to your personal and business interests.

Your Assante advisor has access to the expertise of the Wealth Planning Group, comprised of accountants, lawyers/notaries and financial planners who have specialized knowledge and extensive experience in tax, estate, succession and financial planning for individuals, families and corporations in Canada.

Drawing on the experience of this group, your Assante advisor can formulate a plan that is personalized to your unique situation. Contact your Assante advisor today to learn how you can benefit from a complete approach to wealth management.

Assante®
PRIVATE CLIENT

Meet our Wealth Planning Professionals

CHRIS PATERSON, BA, LLB, TEP
Vice-President, Wealth Planning Group

Chris has overall responsibility for the Wealth Planning Group. This includes managing the delivery of wealth planning services to clients as well as the continuing development of the service offering. In addition, Chris provides tax, estate, and succession planning advice to clients.

JACKIE NEWTON, BComm (Hons), CPA, CA, CFP®
Director, Financial Planning

Jackie is responsible for management of the financial planning function within the Wealth Planning Group. In addition, Jackie provides financial, tax, and succession planning advice to clients.

Jerry S. Rubin, BES, BComm (Hons), CPA, CMA, TEP, CFP®
Director, Wealth Planning Projects

Jerry is responsible for initiating and implementing key large and small scale projects within the Wealth Planning Group. In addition, Jerry provides tax, estate, and succession planning advice to clients.

Wealth Planning Analysts

These financial planning professionals prepare financial analyses and insurance needs analyses for clients. These range from the basic Financial Snapshot to the comprehensive Financial Analysis and Risk Management reports of the Wealth Plan.

Francine Lachiver, BComm (Hons), CPA, CGA, CFP®
Manager, Financial Planning – Gérante, Planification financière

Dean Chambers, BComm (Hons), CFP®
Senior Wealth Planning Analyst

Diana Steiner, BSc, CFP®, CLU
Senior Wealth Planning Analyst

Esther Wai, CFP®, Senior Wealth Planning Analyst

Marion Penner, Senior Wealth Planning Analyst

Randi Grant, BA, FMA, Senior Wealth Planning Analyst

Shaun Marchand, CFP®, Senior Wealth Planning Analyst – Analyste principal en planification du patrimoine

Troy Thompson, BComm (Hons), CPA, CA
Senior Wealth Planning Analyst

Sharon Pankratz, CFP®
Wealth Planning Education Specialist

Brendan Green, Wealth Planning Analyst

David Bricker, BComm (Hons), CFA, Wealth Planning Analyst

Gab Goze, Wealth Planning Analyst

Jean-Francois Raymond, Wealth Planning Analyst – Analyste en planification du patrimoine

Jonnathan Derksen, FPSC Level 1® Certificant in Financial Planning, Wealth Planning Analyst

Julia Arkova, Wealth Planning Analyst

Madi O'Keeffe, BA, Wealth Planning Analyst

Mychal Nemetchek, BComm (Hons)
Wealth Planning Analyst

Sam Dhaoui, BBA, Wealth Planning Analyst – Analyste en planification du patrimoine

Seif Dhaoui, BBA, Wealth Planning Analyst – Analyste en planification du patrimoine

Wealth Planning Consultants

These professionals are accountants and lawyers with years of experience in serving the needs of high net worth clients. They are responsible for providing personal and corporate tax, succession, and estate planning advice and preparing personal, business, and estate planning reports of the comprehensive Wealth Plan.

Aaron Ingram, BSc, JD, Estate Planning Consultant

Gregory Ott, BComm(Hons), MAcc, CPA, CA, CFP®
Tax Consultant

Jamie Dunlop, LLB, LLM, TEP, Estate Planning Consultant

Jane Shanks, BA, LLB, TEP, Estate Planning Consultant

Jeremy Spiegel, BComm(Hons), LLB
Estate Planning Consultant

Kim Isings, LLB, BCL, DDN, TEP, Estate Planning Consultant – Conseillère en planification successorale

Krysta Adamski, CPA, CA, Tax Planning Consultant

Magali Dussault-Brodeur, LLB, DDN, MFisc
Estate Planning Consultant – Conseillère en planification successorale

Marcel Godbout, CPA, CA, Tax Planning Consultant

Marla Shragge, LLB, CFP®, TEP, Estate Planning Consultant

Nadine Deschênes, LLL, LLM, Tax Planning Consultant – Conseillère en planification fiscale

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