

## Canadian Advice-Only Planner Directory [Updated July 2024]

Prepared by Steadyhand Investment Management Ltd.

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**\*Note: All of the financial planners have certified they do not take referral fees.**

### Alberta

Name	Company	Email Address	Provinces Served	Additional Specialties (Other than Retirement Planning)	Fee Range	Website
Allan Buckingham	Outdoor Life Planning	Allan@OutdoorLifePlanning.ca	All	Outdoor Focused Lifestyle	\$300 to \$2,300 then monthly from \$25-\$175	<a href="https://www.outdoorlifeplanning.ca/">https://www.outdoorlifeplanning.ca/</a>
Barbara Knoblach	Money Coaches Canada	barbara@moneycoachescanada.ca	All	Corporate Planning Business Owner Planning Medical Professionals	\$4,000 to \$10,000	<a href="https://moneycoachescanada.ca/about/Barbara-Knoblach/">https://moneycoachescanada.ca/about/Barbara-Knoblach/</a>
Diane Dekanic	Financial Health Management Inc.	ddekanic@fhminc.ca	Not QC	Tax Prep and Filing	\$250/hr or Project based \$2500	<a href="http://www.fhminc.ca">www.fhminc.ca</a>
Drew Adamick	Divergent Financial Planning	info@divergentfp.ca	Not QC	Complex Estate Planning Disability Planning LGBTQAI2S+ Households	\$1,000 - \$5,000	<a href="https://www.divergentfp.ca">https://www.divergentfp.ca</a>
Jane Bolstad	Trusted Financial Planning	jane@trustedfinancialplanning.com	Only AB, BC, ALT, SK		\$2,000 and hourly rate of \$175	<a href="http://trustedfinancialplanning.com">trustedfinancialplanning.com</a>
John Jakobs	Jakobs Financial	john.jakobs5@gmail.com	Not QC	Regular Canadians	\$500 to \$1,000	<a href="https://jakobs-finance.blogspot.com/">https://jakobs-finance.blogspot.com/</a>
Kenneth Doll	Alberta Financial Planner	Ken@AlbertaFinancialPlanner.ca	Not QC	Trusts & Complex Estate Planning Cross Border Planning Corporate Planning Professional Athletes	\$3,000 to \$6,000	<a href="http://AlbertaFinancialPlanner.ca">AlbertaFinancialPlanner.ca</a>
Robb Engen	Boomer & Echo	robbengen@gmail.com	All	Cash Flow Management Debt Management	\$2,400 to \$2,700	<a href="https://boomerandecho.com/fee-only-advice/">https://boomerandecho.com/fee-only-advice/</a>
Ron Graham	Ron Graham and Associates Ltd.	info@rgafinancial.com	Not QC	Tax Prep and Filing	\$550 to \$3,300	<a href="https://rgafinancial.com/">https://rgafinancial.com/</a>
Russ Dyck	Finovo Financial Planning	russ@finovo.ca	Not QC	Couples/Family Money Management Small Business/Self Employed	\$1,000 to \$4,500	<a href="https://finovo.ca/">https://finovo.ca/</a>
Spencer Mellace	Experience Financial	spencer@experiencefcc.com	Not QC	Family Business Business Owner Planning Corporate Planning Succession and Estate Planning	\$10,000+	<a href="http://www.experiencefcc.com">www.experiencefcc.com</a>
Tom Feigs	Money Coaches Canada	tom@moneycoachescanada.ca	Not QC	Corporate Planning Small Business/Self Employed	\$2,500 to \$7,000	<a href="https://moneycoachescanada.ca/about/Tom-Feigs/">https://moneycoachescanada.ca/about/Tom-Feigs/</a>
Val Kumagai	Money Coaches Canada	val@moneycoachescanada.ca	Not QC	Corporate Planning Small Business/Self Employed	\$3,500 to \$8,000	<a href="https://moneycoachescanada.ca/about/Val-Kumagai/">https://moneycoachescanada.ca/about/Val-Kumagai/</a>

### British Columbia

Name	Company	Email Address	Provinces Served	Additional Specialties (Other than Retirement Planning)	Fee Range	Website
Annie Kvick	Money Coaches Canada	annie@moneycoachescanada.ca	All	Corporate Planning Cross Border Planning	\$6,000 to \$8,000	<a href="https://moneycoachescanada.ca/about/Annie-Kvick/">https://moneycoachescanada.ca/about/Annie-Kvick/</a>
Anthony Larsen	The Financial Handyman	anthony.larsen@thefinancialhandyman.ca	Not QC	Middle Class Households Segmented Planning	\$350 to \$3,000	<a href="http://www.thefinancialhandyman.ca">www.thefinancialhandyman.ca</a>
Cole Schneider	The Dixon Davis Group	cole@dixondavis.com	Not QC, ON	Corporate Planning	\$3,300 to \$12,000	<a href="https://www.dixondavis.com/">https://www.dixondavis.com/</a>
Hannah McVean	Objective Financial Partners	hmcvean@objectivefcfp.com	All	Tax Prep and Filing	\$1,500 to \$6,000	<a href="https://objectivefinancialpartners.com/">https://objectivefinancialpartners.com/</a>
Jim Pan	Panorama Advisory Group Inc.	Jim.pan@panadvisory.ca	Not QC	Corporate Planning Health Care Professionals	\$300/hour, \$1,500 to \$6,000 or \$1,500 to \$2,000 + \$300-400/month	<a href="http://www.panadvisory.ca">www.panadvisory.ca</a>
Julia Chung	Spring Planning	info@springplans.ca	All	Trusts & Complex Estate Planning Cross Border Planning Corporate Planning Business Owners	\$7,000 to \$15,000	<a href="https://springplans.ca/">https://springplans.ca/</a>
Karin Mizgala	Money Coaches Canada	karin@moneycoachescanada.ca	All		\$5,000 to \$7,500	<a href="https://moneycoachescanada.ca">https://moneycoachescanada.ca</a>
Kristen Pedersen	Money Coaches Canada	Kristen@moneycoachescanada.ca	Not QC	Cash Flow and Debt Management	\$4,000 to \$7,000	<a href="https://moneycoachescanada.ca/about/Kristen-Pedersen/">https://moneycoachescanada.ca/about/Kristen-Pedersen/</a>
Lena Keshysheva	Sapling Financial Planning	lena@saplingfp.ca	All	Complex Estate Planning Insurance Planning Corporate Planning Real Estate Investing	\$2,000 to \$10,000	<a href="http://www.saplingfp.ca">www.saplingfp.ca</a>
Lorna Eastman	Lorna Eastman and Associates Ltd	lorna@lornaeastmanfinancial.com	Not QC	Pension Plans Small Business Owners	\$2,500 to \$5,000, \$500 Initial Review	<a href="http://www.lornaeastmanfinancial.com">www.lornaeastmanfinancial.com</a>

Name	Company	Email Address	Provinces Served	Additional Specialties (Other than Retirement Planning)	Fee Range	Website
Mark Lotocky	The Dixon Davis Group	Mark@dixondavis.com	All	Trusts & Complex Estate Planning Corporate Planning Small Business Owners Health and Wellness Industry	\$2,640 to \$9,240/year	<a href="http://www.DixonDavis.com">www.DixonDavis.com</a>
Michael Deepwell	Lamp Financial Inc	michael@lampfinancial.com	Not QC	Trusts & Complex Estate Planning Corporate Planning Tax Prep and Filing Business Owners	\$3,600 to \$8,000	<a href="http://www.lampfinancial.com">www.lampfinancial.com</a>
Sheila Walkington	Money Coaches Canada	sheila@moneycoachescanada.ca	All	Cash Flow and Debt Management	\$3,600 to \$5,500	<a href="https://moneycoachescanada.ca/about/sheila-walkington/">https://moneycoachescanada.ca/about/sheila-walkington/</a>
Steve Bridge	Money Coaches Canada	steve@moneycoachescanada.ca	All		\$4,500 to \$10,000	<a href="https://moneycoachescanada.ca/about/steve-bridge/">https://moneycoachescanada.ca/about/steve-bridge/</a>

#### Manitoba

Name	Company	Email Address	Provinces Served	Additional Specialties (Other than Retirement Planning)	Fee Range	Website
Jason Evans	Evans Retirement Planning	jason@evansretirement.ca	Not QC		\$1,700 to \$5,000	<a href="https://www.evansretirement.ca/">https://www.evansretirement.ca/</a>

#### Nova Scotia

Name	Company	Email Address	Provinces Served	Additional Specialties (Other than Retirement Planning)	Fee Range	Website
Ben Mayhew	Aergo Financial Planning	ben@aergofp.ca	Not QC	Corporate Planning Physicians, Young Professionals	\$2,000 to \$5,000	<a href="https://www.aergofp.ca">https://www.aergofp.ca</a>
David Martin	Eltero Financial Partners Inc.	david@elterofinancial.com	Not BC, AB, SK, MB, QC	Corporate Planning Divorced/Widowed, Second Marriage	\$1,500 to \$4,000	<a href="https://elterofinancial.com/">https://elterofinancial.com/</a>

#### Ontario

Name	Company	Email Address	Provinces Served	Additional Specialties (Other than Retirement Planning)	Fee Range	Website
Alex Hadjisophocleous	Forest Financial Planning	alex@forestfinancialplanning.ca	All	Corporate Planning Tech Professionals	\$2,000 to \$6,000	<a href="https://forestfinancialplanning.ca/">https://forestfinancialplanning.ca/</a>
Andrea Thompson	Modern Cents	Andrea@moderncents.ca	Not QC	Corporate Planning Cross Border Planning	\$2500 to \$5000	<a href="https://www.moderncents.ca/">https://www.moderncents.ca/</a>
Andrew Dobson	Objective Financial Partners Inc.	adobson@objectivecfp.com	All	Trusts & Complex Estate Planning Corporate Planning Tax Prep and Filing Cross Border Planning	\$1,500 to \$5,000	<a href="https://objectivefinancialpartners.com/">https://objectivefinancialpartners.com/</a>
Anita Bruinsma	Clarity Personal Finance	anita@clarityonyourmoney.com	All	Do-it-Yourself Investors	\$1,000 to \$1,500	<a href="http://www.clarityonyourmoney.com">www.clarityonyourmoney.com</a>
Brenda Hiscock	Objective Financial Partners	bhiscock@objectivecfp.com	All	Trusts & Complex Estate Planning Corporate Planning Cross Border Planning Disability Planning, Expatriate Planning	\$2,000 to \$10,000	<a href="http://www.objectivefinancialpartners.com">www.objectivefinancialpartners.com</a>
Cherise Berman	Bespoke Financial Consulting Inc.	Cherise@bespokefinancial.ca	Not QC	Complex Estate Planning Corporate Planning Corporate Executives	\$4,000 to \$8,500	<a href="http://www.bespokefinancial.ca">www.bespokefinancial.ca</a>
Chris Merrick	Merrick Financial Inc.	chris@merrickfinancial.ca	Not QC	Corporate Planning	\$2,500 to \$10,000	<a href="http://www.merrickfinancial.ca">www.merrickfinancial.ca</a>
Christine White	Money Coaches Canada	christine@moneycoachescanada.ca	All	Divorce Managing Inconsistent Income	\$2,500 to \$6,500	<a href="https://moneycoachescanada.ca/about/christine-white/">https://moneycoachescanada.ca/about/christine-white/</a>
Cynthia Kett	Stewart & Kett Financial Advisors Inc.	cynthia.kett@stewartkett.com	Not QC	Trusts & Complex Estate Planning Corporate Planning Tax Prep & Filing	\$6,000 to \$60,000/year	<a href="https://www.stewartkett.com/">https://www.stewartkett.com/</a>
David Field	Papyrus Planning	dave@papyrusplan.com	All	Complex Estate Planning Corporate Planning	\$1,800 to \$5,000	<a href="https://www.papyrusplan.com">https://www.papyrusplan.com</a>
David O'Leary	Kind Wealth	dave@kindwealth.ca	All	Trusts & Complex Estate Planning Corporate Planning Virtual Family Office Experience Executives & Affluent Families	Min fee is \$5,000/yr. Based on .35% of Net worth.	<a href="http://www.kindwealth.ca">www.kindwealth.ca</a>
Heather Holjevac	Holjevac Financial Group	Info@heatherholjevac.com	Not QC	Complex Estate Planning Women Searching Financial Help	\$1,500 to \$5,000	<a href="http://Www.holjevacfinancialgroup.com">Www.holjevacfinancialgroup.com</a>
James MacBride	Stewart & Kett Financial Advisors Inc.	jamie.macbride@stewartkett.com	Not QC	Complex Multi Generational Families Trusts & Complex Estate Planning Corporate & Cross Border Planning Tax Prep & Filing	\$6,000 to \$50,000/yr	<a href="https://www.stewartkett.com/">https://www.stewartkett.com/</a>

Name	Company	Email Address	Provinces Served	Additional Specialties (Other than Retirement Planning)	Fee Range	Website
Janet Gray	Money Coaches Canada	janet@moneycoachescanada.ca	All	Seniors	\$5,000 to \$8,000+	<a href="https://moneycoachescanada.ca/about/janet-gray/">https://moneycoachescanada.ca/about/janet-gray/</a>
Jason Heath	Objective Financial Partners	jheath@objectivecfp.com	All	Trusts & Complex Estate Planning Corporate & Cross Border Planning Tax Prep & Filing Canadian Expat Planning	Starting at \$1,500	<a href="http://www.objectivefinancialpartners.com">www.objectivefinancialpartners.com</a>
Jason Maule	Objective Financial Partners	jmaule@objectivecfp.com	All	Business Owner Planning Corporate Planning Tax Planning	Starting at \$1,500	<a href="http://www.objectivefinancialpartners.com">www.objectivefinancialpartners.com</a>
Justine Kelly	Modern Cents	justine@moderncents.ca	Not QC	Young Families Women Searching Financial Help	\$330 to \$3,000	<a href="https://www.moderncents.ca/">https://www.moderncents.ca/</a>
Kristine Beese	Untangle Money	kristine@untangle.money	All	Middle-Income Women & Couples	\$500 for Untangle MINI, \$2,500 for Untangle MAXI.	<a href="https://www.untangle.money">https://www.untangle.money</a>
Lesley Poole	Next Chapter	lesley@ournextchapter.ca	All	Trusts Corporate Planning Cross Border Planning	\$2,900	<a href="https://www.yournextchapter.ca/">https://www.yournextchapter.ca/</a>
Linda Stalker	Henderson Partners LLP	lstalker@hendersonpartnersllp.ca	All	Trusts & Complex Estate Planning Corporate & Cross Border Planning Tax Prep & Filing Ongoing Planning Services	Min annual fees \$5,000	<a href="http://www.henderson-partners.com">www.henderson-partners.com</a>
Liz Schieck	The New School of Finance Inc.	liz@newschooloffinance.com	All	Corporate Planning	\$325 to \$2,500	<a href="https://www.newschooloffinance.com/">https://www.newschooloffinance.com/</a>
Marlene Buxton	Buxton Financial For Retirement	letschat@buxtonfinancial.ca	All	Income Planning	\$4,995 to \$7,995	<a href="http://www.buxtonfinancial.ca">www.buxtonfinancial.ca</a>
Meghan Chomut	Porte Rouge	meghan@porterouge.co	All	Not Taking Clients At This Time Tax Prep & Filing Plans with a Rental Property	\$3,000 to \$8,000	<a href="http://www.porterouge.co">www.porterouge.co</a>
Meri-Li Forrest	Be Wealthy Financial Coaching Inc.	hello@bewealthycoaching.com	All	Financial Anxiety & Money Avoidance GenX & Millennial Plans Small Business Owners Do-it-Yourself Investors	\$1,000 to \$2,500, Hourly \$175	<a href="https://www.bewealthycoaching.com/">https://www.bewealthycoaching.com/</a>
Mike Burns	Objective Financial Partners Inc.	mburns@objectivecfp.com	All	Trusts & Complex Estate Planning Tax Planning	\$1,500 to \$8,000	<a href="https://objectivefinancialpartners.com/">https://objectivefinancialpartners.com/</a>
Nancy Grouni	Objective Financial Partners	ngrouni@objectivecfp.com	All	Business Owner Planning Corporate Planning	\$3,000 to \$7,500	<a href="https://objectivefinancialpartners.com/">https://objectivefinancialpartners.com/</a>
Nicholas Hui	VAVE Financial Planning	nhui@vavefinancial.com	Not QC	Engineering/Tech Professionals	\$1,500 to \$5,000	<a href="http://www.vavefinancial.com/">http://www.vavefinancial.com/</a>
Owen Winkelmolen	PlanEasy.ca	owen.winkelmolen@planeasy.ca	Not QC	Low-Income Retirement Planning Guaranteed Income Supplement (GIS)	\$500 to \$2,000	<a href="https://www.planeasy.ca/">https://www.planeasy.ca/</a>
Russell Sawatsky	Money Architect Financial Planning	russ@moneyarchitect.ca	Not QC	Do-it-Yourself Investors	\$1,050 to \$3,000	<a href="https://moneyarchitect.ca/">https://moneyarchitect.ca/</a>
Sandi Martin	Sandi Martin Financial Planning	sandi@sandimartin.ca	Not QC		\$3,900 to \$4,700	<a href="https://sandimartin.ca/sandi-martin">https://sandimartin.ca/sandi-martin</a>
Sandra Mann	Money Coaches Canada	sandra@moneycoachescanada.ca	All		\$4,800 to \$6,000	<a href="https://moneycoachescanada.ca">https://moneycoachescanada.ca</a>
Sara McCullough	WD Development	sara@wddevelopment.ca	Not QC	Corporate Planning Business Transition Plans Separation and Divorce	\$1,800 to \$12,000	<a href="http://www.wddevelopment.ca">www.wddevelopment.ca</a>
Scott Robertson	Tasman Financial Services	Scott@tasman.ca	Not SK, PEI, NL	Trusts & Complex Estate Planning Tax Prep & Filing Ongoing Planning & Monitoring	\$3,000 to \$30,000	<a href="http://www.tasman.ca">www.tasman.ca</a>
Shannon Lee Simmons	The New School of Finance Inc	Shannon@newschooloffinance.com	All	Tax Prep & Filing Self Employed Divorce	\$450 to \$1,000	<a href="http://www.newschooloffinance.com">www.newschooloffinance.com</a>
Shay Steacy	inBalance Financial Planning	shay@inbalancefp.ca	Not QC	Small Business Owners Couples/Family Money Management	\$2,850 to \$4,000	<a href="http://www.inbalancefp.ca">www.inbalancefp.ca</a>
Steven Arnott	Ripple Financial Planning	steven@ripplefinancial.ca	All	Family Planning Career Transitions	\$1,000 to \$2,000	<a href="https://ripplefinancial.ca/">https://ripplefinancial.ca/</a>
Sunny Wishart	A la Carte Financial	sunny@alacartefinancial.ca	All	Young Families Women in Separation or Divorce	\$100 to \$2,000	<a href="https://www.alacartefinancial.ca/">https://www.alacartefinancial.ca/</a>
Thuy (Twee) Lam	Objective Financial Partners	tlam@objectivecfp.com	All	Cash Flow Management Financial Coaching Trusts & Complex Estate Planning	\$1,500 or \$75-125/month	<a href="https://objectivefinancialpartners.com/">https://objectivefinancialpartners.com/</a>
Tim Lew	Kind Wealth	tim@kindwealth.ca	Not NWT	Corporate Planning Business Exit/Succession Plans HNW/UHNW Individuals	A declining grid, starting at 0.35% of net worth	<a href="https://www.kindwealth.ca">https://www.kindwealth.ca</a>
Vikki Brown	Modern Cents	vikki@moderncents.ca	Not QC	Cross Border Planning	\$2,000 to \$7,250	<a href="https://www.moderncents.ca/">https://www.moderncents.ca/</a>

Quebec

Name	Company	Email Address	Provinces Served	Additional Specialties (Other than Retirement Planning)	Fee Range	Website
Roger Massicotte	Ma Vie - Mes Finances	roger.massicotte@maviemesfinances.ca	Only QC	Financial Coaching Program Small Business Owners	\$3,000 to \$10,000	

Saskatchewan

Name	Company	Email Address	Provinces Served	Additional Specialties (Other than Retirement Planning)	Fee Range	Website
Jason Yee	Finepoint Solutions Inc.	greetings@finepointsolutions.ca	Not QC	Canada Pension Plan (CPP) Technical Professionals Evidence Based Methodologies	\$3,700 to \$5,500	<a href="https://finepointsolutions.ca/">https://finepointsolutions.ca/</a>

Yukon

Name	Company	Email Address	Provinces Served	Additional Specialties (Other than Retirement Planning)	Fee Range	Website
Jason Flynn	ABZ Financial Planning	jason@abzplan.ca	All	Trusts & Corporate Planning Tax Prep and Filing Disability Planning RCMP Members	\$2,900 to \$8,900	<a href="https://www.abzplan.ca/">https://www.abzplan.ca/</a>