Canadian Advice Only Planner Directory [June 2022]

Prepared by Steadyhand Investment Management Ltd.

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British Columbia

Name	Company	Email Address	Location	Practice Specialty(s)	Capacity to Onboard New Clients & Estimated Timeline	Fee Details	Preferred Method of Contact	Website
Sheldon Craig	Craig Consulting	sheldon.craig@craigconsulting.ca	Osoyoos, BC	Retirement Income Budgeting and Cash Flow Pre-Retirement Estate Planning Debt Management	I can meet with them immediately. My timeline is approximately 2 weeks for a draft copy once I commence analyzing the plan. Depending on my current capacity, I can commence work on plans within 2 weeks of meeting with them.	Comprehensive Planning $2,000-$4,000 plus GST. Modular Planning, $1,000 - $2,000. Monthly Retainer (if applicable) - $250 per month plus GST	Email Book a meeting via website	www.craigconsulting.ca
Karin Mizgala	Money Coaches Canada	karin@moneycoachescanada.ca	Salt Spring Island, BC	Pre-Retirement Retirement Income Financial Anxiety	I am not currently working with new clients. You will be well served by one of my colleagues at Money Coaches Canada.	Fees based on scope and complexity - typically in the $4,000 - $6,000 range. Fees for ongoing services established after initial planning phase.	Email Book a meeting via website	https://moneycoachescanada.ca/about/
Annie Kvick	Money Coaches Canada	annie@moneycoachescanada.ca	Vancouver, BC	Pre-Retirement Retirement Income Budgeting and Cash Flow Major Transitions (separation/divorce/loss of spouse/job) High Net Worth/Complex situations	3 month waitlist	Fee for service, per plan/project	Email Book a meeting via website	https://moneycoachescanada.ca/about/Annie-Kvick/
Anthony Larsen	The Financial Handyman	anthony.larsen@thefinancialhandyman.ca	Vancouver, BC	Segmented planning, smaller jobs Budgeting and Cash Flow Retirement Income Pre-Retirement	Good capacity at the moment. 2 weeks ahead.	I provide an estimated quote for a job which is based on my time, on an hourly basis. No Commisions. No Referral fees. No ongoing, monthly, annual membership or retainer fees.	Book a meeting via website	https://www.thefinancialhandyman.ca
Christine Williston	Money Coaches Canada	christinewilliston@moneycoachescanada.ca	Vancouver, BC	Budgeting and Cash Flow	Exploratory call within two weeks, Onboarding clients within one month	Flat fee for engagement	Email	https://moneycoachescanada.ca/about/christine-williston/
Daniel Evans	Money Coaches Canada	daniel@moneycoachescanada.ca	Vancouver, BC	High Net Worth / Complex situations Pre-Retirement RSU/Stock Options/New to Canada Retirement Income	Three to six weeks from initial contact to an introductory call.	The planning engagement fee ranges from $4,500 to $10,000. Complexity increases the cost of engagement.	Email Book a meeting via website	https://moneycoachescanada.ca/about/Daniel-Evans/
Michael Deepwell	Lamp Financial Inc	michael@lampfinancial.com	Vancouver, BC	Pre-Retirement Retirement Income Major Transitions (separation/divorce/loss of spouse/job) High Net Worth / Complex situations Corporations & businesses, succession planning, tax planning	Introductory call can happen within the next week or 2, but work would start after April. This is for Jan to April period. For May-Dec, introductory call and start of work happens within 3-4 weeks usually, or sooner if they are ready to go	Fees for service	Email	https://www.lampfinancial.com/
Natasha Knox	Alaphia Financial Wellness	natasha@alaphia.ca	Vancouver, BC	Sudden Wealth Wealth imbalance in the family system Complex family dynamics Intercultural financial relationships Non-traditional family structures Compulsive spending Financial anxiety Money avoidance	Currently about one month to onboard new clients - still taking a limited amount of exploratory calls - available through website booking link.	Project based or hourly or combination- it depends on the situation and what we are doing. I usually give clients the option. There are a limited amount of retainer spots left.	Book a meeting via website	https://alaphia.ca
Sheila Walkington	Money Coaches Canada	sheila@moneycoachescanada.ca	Vancouver, BC	Budgeting and Cash Flow Buying home, starting family, debt Pre-Retirement	1-2 new clients a month, wait could be 1-3 months to get started.	$2750 - $6000 per engagement (4 meetings over 4 months).	Email Book a meeting via website	https://moneycoachescanada.ca/
Spring Plans (Julia Chung, Sandi Martin)	Spring Planning Inc.	info@springplans.ca	Vancouver, BC	Retirement Income Major Transitions High Net Worth/Complex situations US citizens resident in Canada	Focus on serving right client demographic. Discovery calls within one month. Onboarding will take three months.	Project and/or hourly.	Book a meeting via website	https://springplans.ca
Steve Bridge	Money Coaches Canada	steve@moneycoachescanada.ca	Vancouver, BC	Pre-Retirement Retirement Income Budgeting and Cash Flow Financial Planning	Introduction phone call three weeks out, complimentary meeting four to five weeks after that.	Transparent upfront fee based on the complexity of the situation.	Email	https://moneycoachescanada.ca/about/Steve-Bridge/
Mark Lotocky	Dixon Davis Financial Planning	mark@dixondavis.com	Victoria, BC	Pre-Retirement Retirement Income; Major Transitions (separation/divorce/loss of spouse/job) High Net Worth / Complex situations Corporate Structures	Current time to introductory/exploratory meeting is about two weeks. Once engagement has been agreed to may take 3 - 6 months for completion.	We charge fees on a project basis which are based on complexity and estimated hours to complete. Fee is disclosed up front and agreed upon by both parties.	Email Book a meeting via website	www.dixondavis.com

Alberta

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Diane Dekanic	Financial Health Management Inc.	ddekanic@fhminc.ca	Calgary, AB	Pre-Retirement Retirement Income Budgeting and Cash Flow Major Transitions (separation/divorce/loss of spouse/job)	Generally within 2 weeks except for March and April during Tax season. New clients are deferred to May. Existing clients no deferral during that time. I provide for a Meet and Greet appointment (No Charge - 30 min) for the introductory/exploratory call. Appointments are booked online.	$250/hr plus GST or project fee. Can provide a Fee Schedule.	Email Book a meeting via website	www.fhminc.ca
Jane Bolstad	Trusted Financial Planning	jane@trustedfinancialplanning.com	Calgary, AB	Pre-Retirement Retirement Income Investment Reviews	Introductory call can be scheduled typically within 10 days of initial contact.	Quote provided after initial complementary phone call.	Email	https://www.trustedfinancialplanning.com/

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Kenneth Doll	Objective Financial Partners Wealth Architects Inc.	kdoll@objectivecfp.com Ken@WealthArchitects.ca	Calgary, AB	Pre-Retirement Retirement Income Major Transitions (separation/divorce/loss of spouse/job) High Net Worth / Complex situations Holistic Financial Planning, Estate Planning Insurance Planning, Cross-Border Financial Planning Professional Athletes	Introductory call within two weeks.	A flat fee based on complexity and desired plan.	Email]	https://objectivefinancialpartners.com/
Russell Todd RFP (Retired)	The Financial Mentor	russell@thefinancialmentor.ca	Calgary, AB	Introductions to Financial Professionals	We limit new client projects after initial discussion on needs, as we are semi-retired, no longer doing active financial planning projects.	Hourly rate/ Project based in some cases	Email	www.thefinancialmentor.ca
Tom Feigs	Money Coaches Canada	tom@moneycoachescanada.ca	Calgary, AB	Pre-Retirement Retirement Income Major Transitions (separation/divorce/loss of spouse/job)	Within one month	A flat fee charged based on the complexity of the desired program	Email Book a meeting via website	https://MyMoneyMyLife.as.me/
Val Kumagai	Money Coaches Canada	val@moneycoachescanada.ca	Calgary, AB	Pre-Retirement Retirement Income Major Transitions (separation/divorce/loss of spouse/job)	Initial Consultations generally booking within about 2-3 weeks.	Advice-only planner with fees quoted and charged based on type of engagement.	Email Book a meeting via website	https://moneycoachescanada.ca/about/Val-Kumagai/
Barbara Knoblach	Money Coaches Canada	barbara@moneycoachescanada.ca	Edmonton, AB	High Net Worth / Complex situations Pre-Retirement I cover all of the above listed topics, but the focus of my practice is on high income/high net worth individuals (medical professionals, business owners, etc.)	I am typically able to schedule an introductory call/consultation meeting within a few weeks.	I charge a flat fee for creating a financial plan, which is determined by complexity/amount of work involved. Ongoing clients pay a monthly fee, which is determined by complexity and number of meetings per year.	Email Book a meeting via website	https://moneycoachescanada.ca/about/Barbara-Knoblach/
Ron Graham	Ron Graham and Associates Ltd.	rgraham@rgafinancial.com	Edmonton, AB	Pre-Retirement Retirement Income	Currently booking two weeks out.	Hourly rate of $250, hours based on time spent on project.	Book through receptionist	www.rgafinancial.com

Saskatchewan

Name	Company	Email Address	Location	Practice Specialty(s)	Capacity to Onboard New Clients & Estimated Timeline	Fee Details	Preferred Method of Contact	Website
Brandon Wiebe	Money Helps Financial Services	moneyhelps@gmail.com	SK	Pre-Retirement Retirement Income Budgeting and Cash Flow	I charge a fee based on project completed for the client. In depth plans have a set rate that will be quoted after discovery. One time consults are offered for non-complex financial questions.	I currently have capacity to onboard clients with an introductory call in the first week and to be able to have our initial meeting in two weeks.	Email	https://www.moneyhelps.ca

Ontario

Name	Company	Email Address	Location	Practice Specialty(s)	Capacity to Onboard New Clients & Estimated Timeline	Fee Details	Preferred Method of Contact	Website
Shay Steacy	inBalance Financial Planning	shay@inbalancefp.ca	Brockville, ON	Pre-Retirement Budgeting and Cash Flow Gen X&Y Canadians, most commonly with young children, who fit into one or more of the following: HENRYs- High Earners, Not Rich Yet. Employees with variable compensation. Significantly self-employed, or incorporated small business owners	Call within 2 weeks- start date less than 2 months.	All clients start with a 90 day Financial Jump Start (flat fee $1999-$3999), with optional ongoing engagement (annual retainer charged monthly- $249/month and up).	Book a meeting via website	www.inbalancefp.ca
Sandra Mann	Money Coaches Canada	sandra@moneycoachescanada.ca	Burlington, ON	Pre-Retirement Retirement Income	Introduction/exploratory call within a month, and start working together within 2 to 3 months	Fee for plan based on scope and complexity - typically in the $4,000 - $5,000 range. Ongoing services (optional) fee established once planning phase complete.	Email Book a meeting via website	https://moneycoachescanada.ca/about/Sandra-Mann/
Paul Duxbury	Duxbury and Associates	paul@duxburyandassociates.com	Kitchener, Waterloo, Cambridge, ON	Pre-Retirement Retirement Income	One week	Fixed fee quoted in advance or by the hour.	Email	www.duxburyandassociates.com
Sara McCullough	WD Development	sara@wddevelopment.ca	Kitchener, ON	Major Transitions (separation/divorce/loss of spouse/job) High Net Worth / Complex situations	intro call within 10 days-2 weeks/ starting a plan within 4 weeks	either invoicing hourly or a fixed price agreement (scope of work is outlined for client before planning starts, most cover a 12-mnth period)	Book a meeting via website	https://www.wddevelopment.ca/
Andrew Dobson	Objective Financial Partners Inc.	adobson@objectivecfp.com	London, ON	Cash Flow Planning, Retirement Planning, Investment Planning, Budgeting/Debt Management, Tax Planning, Estate Planning	Intro Call - 2-4 weeks on average with work to start upon formalizing an agreement and all relevant information being received	Hourly @ $350 per hour + tax, Retirement Plan starting @ $3,000, Complex Plans starting @ $5,000	Email Book a meeting via website	https://objectivefinancialpartners.com/
Owen Winkelmolen	PlanEasy Inc.	owen.winkelmolen@planeasy.ca	London, ON	Pre-Retirement Retirement Income Low-Income Planning, Family Planning, Getting Started	Discovery call within 1-week (up to 2-weeks depending on the time of year) Final plan within 12-weeks of payment	One-on-One Planning: Initial engagement of 12-weeks to build initial financial plan for $2,950 plus an ongoing engagement with monthly $95 fee for implementation support, regular meetings, and annual plan updates Self-Directed Planning: PlanEasy.ca platform access for $495 up front and $15/month plus ad-hoc 60-minute sessions with an advice-only financial planner for $250+tax	https://app.planeasy.ca/start-discovery	https://www.planeasy.ca/
Russell Sawatsky	Money Architect Financial Planning	russ@moneyarchitect.ca	London, ON	T4 employees DIY investors	Usually within 2 weeks	Project-based fee: 1% of taxable income + 0.5% of net worth $1,000 minimum	Use Contact page on website	https://moneyarchitect.ca/
Brenda Hiscock	Objective Financial Partners	bhiscock@objectivefinancialpartners.com	Markham, ON	Expats, disabled people Pre retirement, retirement Cash flow planning High net worth and complex situations Tax and estate planning Investment planning	1 month wait	Hourly or by project	Book a meeting via website	www.Objectivefinancialpartners.com
Jason Heath	Objective Financial Partners Inc.	jheath@objectivefinancialpartners.com	Markham, ON	High Net Worth / Complex situations Pre-Retirement Retirement Income Major Transitions (separation/divorce/loss of spouse/job)	I am not taking on clients personally but my team has capacity that can vary from month to month.	Typically a flat fee based on understanding a client's situation after an initial phone or Zoom meeting.	Email Book a meeting via website	https://objectivefinancialpartners.com/

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Andrea Thompson	Modern Cents	andrea@moderncents.ca	Mississauga, ON	Cross Border (US/CAN) Retirement Income Pre-Retirement	I have capacity to take calls from and onboard new clients immediately.	My fees are a flat fee per project type, and are all listed on my website. Clients have full transparency as to what their fees will be before entering into an engagement.	Email Book a meeting via website	www.moderncents.ca
David Field	Papyrus Planning	dave@papyrusplan.com	Mississauga, ON	Retirement Income Budgeting and Cash Flow	Capacity and 1 week wait before introductory call.	Flat fee for the entire year with monthly retainer for those that wish to work past the first year.	Email Book a meeting via website CPP Calculator	https://www.papyrusplan.com
Heather Holjevac	Holjevac Financial Group	heather@heatherholjevac.com	Mississauga, ON	Retirement Income Budgeting and Cash Flow Major Transitions (separation/divorce/loss of spouse/job) High Net Worth / Complex situations Caregivers/Aging Parents	2 weeks out for initial call	3 options: 1) Flat fee for service with 1 year of support 2) Hourly or per specific need (ie. cash flow, retirement, divorce planning) 3) Yearly Retainer	Email Book a meeting via website	www.heatherholjevac.com
Linda Stalker	Henderson Partners LLP	lstalker@hendersonpartnersllp.ca	Oakville, ON	Budgeting and Cash Flow Retirement Income Major Transitions (separation/divorce/loss of spouse/job) High Net Worth / Complex situations	Good capacity except from mid-March to end of April (tax season) - introductory call within one week, draft plan to client within 3 weeks after receiving all requested documenationa.	Charge by time spent but will quote a project fee where we can (comprehensive financial plans etc)	Email	https://www.henderson-partners.com/
Janet Gray	Money Coaches Canada	janet@moneycoachescanada.ca	Ottawa, ON	Pre-Retirement Retirement Income	1 week for initial call, new clients onboard 6-8 weeks	per plan, based on complexity of plan	Email	https://moneycoachescanada.ca/about/Janet-Gray/
Scott Robertson	Tasman Financial Services	srobertson@tasman.ca	Ottawa, ON	Pre-Retirement Retirement Income High Net Worth / Complex situations	Within a week for a discussion. Capacity is available.	Annual retainer fees, base on an agreed amount at the beginning of the work.	Email	www.tasman.ca
Meghan Chomut	Porte Rouge	meghan@porterouge.co	Thunder Bay, ON	Families who have rental properties (or want to)	I have capacity. A prospect would be able to meet with me to discuss fit within couple days	I charge a monthly fee	Email Book a meeting via website	www.porterouge.co
Cherise Berman	Bespoke Financial Consulting Inc.	Cherise@bespokefinancial.ca	Toronto, ON	Pre-Retirement Retirement Income Major Transitions (separation/divorce/loss of spouse/job) High Net Worth / Complex situations Budgeting and Cash Flow	Introductory call with potential client within 1 week. Onboarding new client within 2 months.	Flat project fee based on scope and complexity of financial planning	Email	https://www.bespokefinancial.ca/
Chris Enns	Rags to Reasonable	chris@ragstoreasonable.com	Toronto, ON	Budgeting and Cash Flow Self-Employed	You'll be able to have an intro call within 1 to 2 weeks, but booking work will take between 2 and 3 months minimum.	One time planning fee, optional retainer services	Book a meeting via website	www.ragstoreasonable.com
Chris Merrick	Merrick Financial Inc,.	chris@merrickfinancial.ca	Toronto, ON	Retirement Income Pre-Retirement Business owners	Exploratory call within 1 week.	Project fee for each engagement. Monthly ongoing retainer model for complex clients	Email Book a meeting via website	www.merrickfinancial.ca
Cynthia Kett	Stewart & Kett Financial Advisors Inc.	cynthia.kett@stewartkett.com	Toronto, ON	Pre-Retirement;Retirement Income Major Transitions (separation/divorce/loss of spouse/job) High Net Worth / Complex situations Tax planning, investment consulting	We are unable to accept new work from mid-March to mid-May due to tax season. However, we will make time to speak to potential clients as soon as possible (within a week) even though we can't commence work until later.	Fixed fees for services, customized on a client-by-client basis.	Email	www.stewartkett.com,
David O'Leary	Kind Wealth	dave@kindwealth.ca	Toronto, ON	High Net Worth / Complex situations Pre-Retirement Retirement Income Business Owners Tech Employees with high value options/equity VC Investors Intergenerational Wealth	We can take on 1-4 new clients a month (depending on the month). We ask prospective clients to complete an online intake form and upon completion they are provided a link to our calendar to book a free 30-mins intro consult. In this meeting we assess whether we're a good fit and gather enough information to prepare a proposal (which we deliver in a free 45-mins proposal meeting meeting). Both meetings typically take place in 3 - 10 days (depending on client availability).	We've recently switched to advice-only fees calculated as a % of client net worth. We don't manage assets but we do provide investment consulting where we help our clients hire/monitor/replace money managers.	Email Book a meeting via website	www.kindwealth.ca
Jamie Macbride	Stewart & Kett Financial Advisors Inc.	jamie.macbride@stewartkett.com	Toronto, ON	Pre-Retirement;Retirement Income Major Transitions (separation/divorce/loss of spouse/job) High Net Worth / Complex situations Tax planning, investment consulting	We are unable to accept new work from mid-March to mid-May due to tax season. However, we will make time to speak to potential clients as soon as possible (within a week) even though we can't commence work until later.	Fixed fees for services, customized on a client-by-client basis.	Email	www.stewartkett.com,
John Burns	Office of the Public Guardian and Trustee	john.burns@ontario.ca	Toronto, ON	Victims and Vulnerable Persons	Only under the guardianship of the Public Trustee	Fees per hour and assets under management	No direct contact with client	https://www.ontario.ca/page/office-public-guardian-and-trustee
Marlene C. Buxton	Buxton Financial Inc.	letschat@buxtonfinancial.ca	Toronto, ON	Retirement Income	About 3-4 weeks	Flat fee for plan	Book a meeting via website	www.buxtonfinancial.ca
Nancy Grouni	Objective Financial Partners Inc.	ngrouni@objectivecfp.com	Toronto, ON	Planning for Business owners Retirement Income Pre-Retirement High Net Worth / Complex situations	I am taking on clients at the moment. Introductory call within 2 to 3 weeks, work to begin following receipt of onboarding package information.	We offer flat fee and also hourly services	Email	https://objectivefinancialpartners.com/
Nicholas Hui	VAVE Financial Planning	nhui@vavefinancial.com	Toronto, ON	Financial Independence planning Budgeting and Cash Flow Pre-Retirement	Usually one week for a Discovery meeting	Project fee or hourly.	Email Book a meeting via website	www.vavefinancial.com
Nick Boland	Money Coaches Canada	nick@moneycoachescanada.ca	Toronto, ON	Pre-Retirement Retirement Income	Available for Introductory Calls anytime. 3 month wait list to be a new client.	Financial Plans start at $4,000 for a single and $5,000 for a couple. Ongoing fees are sized to fit the engagement	Email	https://moneycoachescanada.ca/about/nick-boland/
Steven Arnott	Ripple Financial Planning	steven@ripplefinancial.ca	Toronto, ON	Early and Mid-Career (e.g., new job, home purchase, starting a family)	Prospects can schedule a complimentary initial consultation call anytime starting the following day. If interested in moving forward, engagements begin within 2 weeks to 3 months depending on availability and client preferences.	I charge a fixed fee at the outset of the engagement based on the scope of work desired from the client. All figures are provided in the Letter of Engagement. No additional fees are charged for any work covered in the Letter of Engagement and no commissions or secondary compensation is earned by me.	Book a meeting via website	https://ripplefinancial.ca/

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Christine White	Money Coaches Canada	christine@moneycoachescanada.ca	Whitby, ON	Pre-Retirement Budgeting and Cash Flow Major Transitions (separation/divorce/loss of spouse/job) Financial Literacy, Debt Management, Holistic Financial Planning	Depending on season, usually exploratory call within 2-4 weeks, onboard within 4 weeks from that.	Flat fee for initial engagement/plan, depending on complexity. Standard Range $2500-$6000 for 4 sessions over 3-6 months and plan. Ongoing clients monthly retainer, depending on complexity and meeting frequency, Standard Range $150-$500/month. Occasional hourly rate for previous clients, depending on unique need.	Email Book a meeting via website	https://moneycoachescanada.ca/about/Christine-White/

Quebec

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Daniele Degano	PlanEasy Inc.	daniele.degano@planeasy.ca	Montreal, QC	Budgeting, cash flow planning, retirement planning, coordinating public and private pensions, residents of Quebec	Discovery call within 1-week (up to 2-weeks depending on the time of year) Final plan within 12-weeks of payment	One-on-One Planning: Initial engagement of 12-weeks to build initial financial plan for $2,950 plus an ongoing engagement with monthly $95 fee for implementation support, regular meetings, and annual plan updates Self-Directed Planning: PlanEasy.ca platform access for $495 up front and $15/month plus ad-hoc 60-minute sessions with an advice-only financial planner for $250+tax	https://app.planeasy.ca/start-discovery?ref=fw5utNPB	https://www.planeasy.ca/
Roger Massicotte	Ma Vie - Mes Finances	roger.massicotte@maviemesfinances.ca	Montreal, QC	Retirement Income High Net Worth / Complex situations	Limited capacity. Introductory call within a week. Plan delivery time between six and eight weeks.	Flat Fee per project	Email	www.maviemesfinances.com