Jamie Robb

CFP, CIM, RRC, CLU, TEP, CDFA, CHFS, FMA, FCSI

FINANCIAL PLANNER & WEALTH ADVISOR

"I believe that true wealth provides us the freedom to pursue our values and enhance the lives of our family, friends and community. This is what Total Wealth Management™ is all about!"
~ **Jamie Robb**

OUR UNIQUE VALUE PROPOSITION

- EDUCATION, EXPERIENCE & EXPERTISE
- STATE OF THE ART TOOLS & TECHNOLOGY
- EMOTIONAL INTELLIGENCE & EMPATHY
- SPECIALTY IN COMPLEX CORPORATE PLANNING
- COLLABORATIVE PROFESSIONAL NETWORK
- COMMITMENT TO DATA SECURITY

WHO DO WE WORK FOR?

AFFLUENT FAMILIES

BUSINESS OWNERS

PROFESSIONALS

STEWARDS OF FAMILY WEALTH

BY REFERRAL ONLY

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WORLDSOURCE FINANCIAL MANAGEMENT INC. *Sponsoring Mutual Fund Dealer*

FIDUCIA WEALTH MANAGEMENT CREATION | PRESERVATION | TRANSFER

SPECIALIZED SERVICES

RETIREMENT PROSPERITY PLAN™

Our proprietary approach helps protect your plan across 4 critical dimensions so you can fully enjoy the fruits of your labour in a Retirement that is *Secure, Sustainable & Serene*.

CORPORATE RETIREMENT STRATEGIES

Looking to maximize the value you can extract from your corporation to fund your retirement and other personal financial goals? We can help.

TAX MANAGEMENT & MINIMIZATION

It's about more than just 'deferral'. We strive to ensure that you pay less total tax over the long-term, not just this year - whether personally, within your business or through your eventual estate and the legacy you leave.

INSURANCE & RISK MANAGEMENT

None of us really enjoy talking about the possibility of bad things happening, but perspective is everything. If you set out to build something worthwhile, then we believe you should "*first build the moat, then build the castle*".

ESTATE & LEGACY PLANNING

An Estate is too often simply 'what is left over'. A Legacy represents an intent to leave not only economic wealth, but a wealth of wisdom, values & continuity. We strive to help our clients achieve the latter.

FINANCIAL NAVIGATOR & CO-ORDINATOR

There are a LOT of moving parts in our financial worlds these days - all inextricably connected to the other parts of our lives. We can help you navigate and coordinate our efforts with your other professionals to ensure the best overall results.

Jamie Robb B. Comm. (Hon), CFP, CIM, RRC, CLU, TEP, CDFA, CHFS, FMA, FCSI

PRINCIPAL & SENIOR WEALTH ADVISOR, FIDUCIA WEALTH MANAGEMENT

Since 1999, Jamie has worked closely with Canadian families and business owners to help them maximize enjoyment of their wealth.

He began his career in Windsor, working with John Toews, a very well respected advisor and owner of Professional Financial Planning. While originally intending to pursue a career as a security analyst at a brokerage house, the opportunity to work directly with clients changed his perspective. The earnest relationships he enjoyed and the positive impact he could have on the lives of his clients and their families led Jamie to fall in love with his client-facing role as a Wealth Advisor. As a result, he excelled at Professional Financial Planning and his role evolved into servicing the top echelon of the firm's clients.

Over the years, Jamie has developed in depth expertise in all areas of wealth management including portfolio construction, risk management, insurance planning, retirement planning and tax, estate and legacy planning. Jamie particularly enjoys working with owner-managers to help them unlock the value of their business and secure the wealth they have built for their family. He is passionate about helping families use their wealth to achieve their life ambitions and charitable objectives while affording themselves the freedom to truly enjoy their time with family and friends.

Ultimately, Jamie strives to help his clients maximize the positive impact of their wealth in the lives of their families and loved ones.

In addition to an Honours Bachelor of Commerce Degree from Laurentian University, Jamie holds the professional designations of Certified Financial Planner, Chartered Investment Manager, Registered Retirement Consultant, Chartered Life Underwriter, Trust & Estate Practitioner, Certified Divorce Financial Analyst, Certified Hedge Fund Specialist and Financial Management Advisor. He is also a Fellow of the Canadian Securities Institute, a member of the Society of Trust & Estate Practitioners (Canada) and The Canadian Tax Federation.

CONTACT JAMIE

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