



UPPER CANADA CAPITAL

Private Wealth Management

Founded by Kurt Rosentreter



KURT ROSENTRETER

BIOGRAPHY

As one of Canada's most credentialed and experienced Wealth Planners, for almost twenty five years Kurt Rosentreter has been committed to helping families manage their finances properly. As a Senior Financial Advisor at Manulife Securities Incorporated, in his Toronto based practice, as an Instructor of Financial Planning in courses he teaches across Canada and as a media spokesperson on money issues for the national press on TV, radio and in print, Kurt provides practical and common sense financial advice in easy to understand language. Kurt takes the stress out of managing money, while helping Canadians to reach their goals and dreams, in a common-sense easy to understand friendly approach.

AN EXCERPT OF KURT'S CREDENTIALS:

- Course Instructor, Investing and Financial Planning, Chartered Professional Accountants of Ontario teaching personal finance to Chartered Accountants in Ontario; endorsed by the Chartered Professional Accountants of Ontario for their membership.
- Eight professional designations in financial planning in addition to a university degree in finance: Chartered Accountant, Certified Financial Planner, Tax and Estate Practitioner, Certified Investment Management Analyst, Financial Management Advisor, Tax Specialist, Bachelor of Commerce (Honours Finance) University of Manitoba, Fellow of the Canadian Securities Institute and Certified Investment Manager.
- Ten years of advanced financial planning experience previously with one of the world's leading professional services firms (National "Big 4" CA firm); past co-founder of their billion dollar investment advisory practice in Canada;
- Respected media expert on personal finance to The Globe and Mail, The National Post, The Toronto Star, Canadian Business Magazine, Maclean's Magazine, Profit Magazine, Canada AM, CBC and many more; more than 500 expert commentaries, interviews and articles written in the last twenty years on finance for Canadians;
- Past National Executive Board Member, Canadian Association of Financial Advisors. Past board or committee member of The Canadian Institute of Chartered Accountants, The Canadian Association of Financial Planners and The Financial Planner Standards Council of Canada.
- National best selling personal finance author in Canada with seven different publications over the last twenty years: "Tax Smart Investing", "Rosentreter's Rules on Wealth Management" and "Wealthbuilding" previously in bookstores nationally;
- Twenty five years in private practice in Toronto, assisting a wonderful group of clients across Canada with all of their money issues.
- Personal interests include mountain biking, tennis, skiing, assisting charities and the arts.
- Married with two daughters.

"Better Investing with a Financial Plan & a Family CFO"

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