



## The Strength of a Broad Advisory Team Focused on Your Goals

### **The Wealth Management Practice of Kurt Rosentreter**

**Kurt Rosentreter, CPA, CA, CFP, CLU, TEP, FMA, CIMA, FCSI, CIM**

Senior Financial Advisor and Associate Portfolio Manager, Manulife Securities Incorporated  
Certified Financial Planner and Insurance Advisor, Manulife Securities Inc.

 **Manulife Securities**



## Financial Analysis, Investment Planning & Financial Planning



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**ext. 230**

**Kurt Rosentreter, CPA, CA, CFP, CLU, TEP, FMA, CIMA, FCSI, CIM**  
Senior Financial Advisor and Associate Portfolio Manager,  
Manulife Securities Incorporated  
Certified Financial Planner and Insurance Advisor,  
Manulife Securities Insurance Inc.

Kurt has long been recognized as one of Canada's most established and credentialed financial experts on matters of investing, taxes, estate, retirement, comprehensive financial planning and wealth management. With more than twenty years experience advising clients, seven published books on personal finance in stores and as Instructor of Wealth Management courses for the Chartered Professional Accountants of Ontario, Kurt brings academic expertise, an integrated planning approach, low fees, technically sound planning and a goal based approach to your finances. Learn more about Kurt at [www.kurtismycfo.com](http://www.kurtismycfo.com).



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**ext. 236**

**Frank Valicek, CFP**  
Financial Advisor, Manulife Securities Incorporated  
Certified Financial Planner, Manulife Securities Insurance Inc.

With over 15 years of financial advisory experience, Frank advises clients on both their investment and personal insurance needs – life, disability, critical illness, long term care. By providing customized investment and insurance solutions, Frank helps clients grow, manage and preserve their wealth. He occupied progressively senior positions at a major financial services firm including managing a professional team of Private Wealth Consultants who advised over \$450 million in client assets. Frank has instructed Seneca College's CFP preparatory course and served on the Investment Funds Institute of Canada's public relations committee.

## Financial Analysis, Investment Planning & Financial Planning



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**Steven McMackon**  
Financial Advisor Associate, Manulife Securities Incorporated

An honours graduate of Queen's University, Steven spent the early portion of his career in Toronto working for HSBC where he was the subject matter expert and leader in global settlements and foreign equity trading. More recently, Steven was responsible for the execution and management of all foreign equity trades at HSBC. He has completed the requirements for a number of professional credentials in the investment industry, including the Canadian Investment Manager (CIM) designation and is a Fellow of the Canadian Securities Institute (FCSI). Steven brings a solid foundation of industry experience and knowledge to the Rosentreter team.



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**Jordan Campbell**  
Financial Advisor Associate, Manulife Securities Incorporated

After completing a post-graduate program in financial planning, Jordan began working as a Personal Banker at RBC where he provided clients with investment, financial and credit advice in addition to building financial plans for them. He has successfully passed all three Chartered Financial Analyst (CFA) exams, considered by many to be some of the most difficult exams in finance and investment analysis.



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**Mathew Cain**  
Financial Advisor Associate, Manulife Securities Incorporated

Mathew brings five years of industry experience to the elite wealth management team of Kurt Rosentreter. After graduating among the top students of his class with a bachelor of commerce degree Mathew began his career as a personal banker at one of the largest banks worldwide taking the branch to number one in Canada. During that time Mathew won two investment competitions recognized by Cornell and Yale University and developed his skills in technical analysis.

## Life, Disability & Critical Illness Insurance



**Vern Lunz, CFP**  
Insurance Specialist, Manulife Securities Insurance Inc.

Vern is an Honours Business Administration graduate and a Certified Financial Planner (CFP). He began his career with a major Canadian insurance company and worked with top financial advisors across southwestern Ontario as a regional marketing specialist.

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Vern's focus is providing tax and estate planning expertise for clients through new and innovative uses of insurance. He has over 15 years of sophisticated planning experience. Vern is a strong resource for designing advanced life insurance solutions for tax-smart retirement income, succession planning for businesses and overall wealth maximization for your estate.

## Mortgages, Lines of Credit, Credit Cards & Bank Accounts



**Marc Poitras**  
Banking Consultant, Manulife Bank & Trust

With over 5 years of banking industry experience, underwriting and client services in the pensions and insurance field. Marc delivers exceptional customer service and helps to educate clients on a more streamlined approach to banking.

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Marc has a BA from the University of Waterloo and has successfully completed the Canadian Securities Course. Marc is available to assist clients in both English and French.

## Advanced Planning, Taxation & Business Management



**Shannon Maguire, CA**  
Finance Manager

Shannon is our team finance guru, bringing twenty years of accounting and finance expertise to our practice after a distinguished career as a Chartered Accountant in a Big Four National Firm and a provincial medalist in obtaining her CA.

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Shannon oversees our accounting systems, handles advanced financial planning analytics, contact management systems, completes tax planning assignments and sophisticated financial planning assignments.

## Employer Group Health & Pension Plans



**Donna Soltes, CLU**  
President, The Professional Group Inc.

A qualified insurance professional with over 25 years in the industry Donna Soltes holds the following designations: CIP-Certified Insurance Professional; CLU-Chartered Life Underwriter; CH.F.C.-Chartered Financial Consultant; CHS-Chartered Health Specialist.

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## Senior Branch Manager



**Ken Truong**  
Senior Branch Manager, Manulife Securities Incorporated

Ken has been a Branch Manager with Manulife Securities since 2006. He brings to the position more than seventeen years experience in the financial services industry with extensive knowledge in trading, and operations.

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Ken has achieved the Chartered Investment Manager (CIM) designation and Fellow of Canadian Securities Institute (FCSI).

## Administration, Record Keeping & Calendar



**Laura Collins**  
Executive Assistant, Manulife Securities Incorporated

Laura's twenty five years of industry experience have made her a model of operational effectiveness. Laura's responsibilities cover a diverse list of essential tasks and there is rarely a time she isn't involved in a client matter: client reporting, account transfers, stock and bond inquiries, investment maintenance, insurance quotes and file preparation. Laura is our "jack of all trades" with the technical competency to handle it all.

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***“Better Investing with a Financial Plan & a Family CFO”***

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