



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



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.

416-628-5761
ext. 230

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.



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

416-628-5761
ext. 236

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



Mathew Cain
Financial Advisor Associate, Manulife Securities Incorporated

416-628-5761
ext. 229

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.



Jordan Campbell
Financial Advisor Associate, Manulife Securities Incorporated

416-628-5761
ext. 223

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.

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.

416-628-5761
ext. 230

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.

416-628-5761
ext. 230

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.

416-628-5761
ext. 230

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.

416-628-5761
ext. 230

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.

416-628-5761
ext. 230

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.

416-628-5761
ext. 239

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

Suite 302 - 3 Church Street, Toronto, Ontario, M5E 1M2

T: 416-628-5761 · **TF:** 1-866-275-5878 (1-866-ASK-KURT) · **F:** 416-225-8650

kurt.rosentreter@manulifesecurities.ca · www.kurtismycfo.com



Manulife Securities and the block design are registered service marks and trade marks of The Manufacturers Life Insurance Company and are used by it and its affiliates including Manulife Securities Incorporated / Manulife Securities Insurance Inc. Manulife Securities Incorporated is a Member of the Canadian Investor Protection Fund

 **Manulife Securities**

