The Wealth Management Practice of Kurt Rosentreter
The Strength of a Broad Advisory Team

Kurt Rosentreter, CA, CFP, CLU, TEP, FMA, CIMA, FCSI, CIM
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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 20 years experience advising clients, seven published books on personal finance in stores and as Instructor of Wealth Management courses for the Institute of Chartered 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.

Lourena Riego 416-628-5761
Financial Advisor Associate, Manulife Securities Incorporated

Lourena brings a multi-faceted advanced skill set to our team, with twenty years of experience in investment strategy, research, investment trading, financial planning, administration and compliance expertise within the Canadian financial services industry. Her professional and quiet demeanor ensure clients always feel comfortable with questions and process. Her strong compliance background ensures that the whole team are closely monitored for accuracy, completeness and promptness in assisting with client's needs.

Laura Collins 416-628-5761
Senior Client Services Coordinator, 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 fund research, investment maintenance, insurance quotes and file preparation. Laura is our "jack of all trades" with the technical competency to handle it all.

Alex Grudiev 416-628-5761

After completing his bachelor degree in mathematics at a top-tier university, Alex successfully studied financial planning on a post-graduate basis. In our team he is responsible for investment research, portfolio maintenance, assistance in financial planning and analysis, as well as related client inquiries. He also oversees the entire life and disability insurance practice support for clients. He is currently working towards the CFP designation and his securities license.

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Certified Financial Planner, Manulife Securities Insurance Inc.

Walter Turner 416-628-5761
Insurance Agent, Manulife Securities Insurance Inc.

For thirty five years, Walter has specialized solely in life insurance, disability insurance and critical illness insurance, providing a wealth of expertise on all areas of insurance planning. On our team, Wally oversees various aspects of client insurance needs, including analysis of existing coverage, quoting for new policies and managing the underwriting of new policy applications. He is equally focused on above average client service, often trying to have the insurance put in place with minimal disruption to your work day and at the lowest cost possible.

Vern Lunz, CFP 416-628-5761
Insurance Specialist, Manulife Securities Insurance Inc.

Vern has an honours business degree, holds the elite Certified Financial Planner designation and he brings more than twenty years of sophisticated planning experience to our team, working solely in the area of specialized life insurance design. Vern is one of the strongest resources in Canada anywhere for designing advanced life insurance solutions for tax smart retirement income, tax smart succession planning of small businesses and overall wealth maximization in your estate.

Shannon Maguire, CA 416-628-5761
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 and a provincial medalist in obtaining her CA. Shannon oversees our accounting systems, handles advanced financial planning analytics, contact management systems, completes tax planning assignments and sophisticated financial planning assignments.

Manulife Securities

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