

The Wealth Management Practice of Kurt Rosentreter

The Strength of a Broad Advisory Team

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

Senior Financial Advisor, Manulife Securities Incorporated

Certified Financial Planner, Manulife Securities Insurance Inc.

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ext. 238

Senior Financial Advisor, Manulife Securities Incorporated

Certified Financial Planner, 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 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.kurtismyco.com.



Victoria Campbell, CFP

ext. 236

Financial Advisor Associate, Manulife Securities Incorporated

Vickie holds the prestigious Certified Financial Planner designation. She oversees specific planning and trading for clients in the areas of investing, retirement planning, children's savings, real estate planning, cash flow budgeting and more. Vickie is also specialized in the needs of high net worth clients and other unique situations such as job change, marriage, divorce, birth and death planning. Vickie is also able to place trades daily on client investment accounts.



Alina Luca

ext. 241

Investment Advisor Associate, Manulife Securities Incorporated

Alina has several years experience in wealth management and is responsible for weekly client meeting analysis and preparation, investment research and analytics, financial planning metrics and compliance tracking. She also oversees the entire life and disability insurance practice support for clients. Alina continues to be busy continuing her professional development, recently achieving her Investment Advisor accreditation. Alina is also able to place trades daily on client investment accounts.



Brandon Whitby, CFP, CIM, FCSI

ext. 230

Senior Financial Advisor, Manulife Securities Incorporated

Branch Manager, Manulife Securities Incorporated

As a former competitive triathlete competing around the world, Brandon brings a commitment and passion to achieving your goals that coupled with his twenty years of experience and advanced planning background makes him a rare commodity in helping your achieve work / personal balance. On our team, Brandon oversees key client relationships, prepares financial plans, completes product analytics, maintains relationships with money managers and maintains our focus to strong compliance.




Rita Fong

ext. 242

Sales Assistant, Manulife Securities Incorporated

In a practice where trading stocks and bonds is an everyday occurrence, Rita's steady hand, ten years of experience and thorough, thoughtful approach ensures portfolios are carefully maintained and rebalanced. Rita is central to portfolio maintenance for the entire practice and couldn't be a stronger resource for all of your trading needs.



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Laura Collins

ext. 240

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.



Walter Turner

ext. 240

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 the topic. 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 workday, and at the lowest cost possible.



Tammy Laframboise, CA

ext. 229

Financial Advisor, Manulife Securities Incorporated
Insurance Agent, Manulife Securities Insurance Inc.

Tammy is a rising star in the financial planning world, offering power tax planning capability as a CA, focusing on preparing comprehensive financial plans for her clients and now also assisting with their insurance and investment needs. Tammy's passion for helping her clients achieve their goals and dreams is evident in her caring approach and warm smile. Tammy works with a wide variety of clients in our practice who share the same goals: they want a planner who will champion their goals and bring a common sense, methodical approach to their financial solutions.



Shannon Maguire, CA

ext. 240

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



Gino Gaglia, CFA, CFP, FMA, FCSI

ext. 240

Branch Manager, Manulife Securities Incorporated

Gino is an experienced financial advisor and holder of the distinguished CFA credential. As the team Branch Manager, he provides daily review and guidance over trade compliance and investment suitability. He can also assist with trading in the event that other traders on the team cannot be reached.

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 **Manulife Securities**

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