RICHARDSON Wealth | The Wronski Cann Group

Our specialty

Your financial security

We help you achieve and maintain the lifestyle you want.

The Wronski Cann Group

We are Portfolio Managers and wealth solutions providers.

Through consistent, repeatable processes we assist our clients and their families with making prudent decisions in building their investments, protecting their assets and realizing your financial objectives.

Our group is comprised of Wealth Advisors and Portfolio Managers **Kathleen Wronski** and **Michael Cann**, Associate Investment Advisor **Jorge Saban Jr.** and Associate **Corey Eccles**. Combined we have over 50 years of experience in the investment industry which gives us the ability to better serve our clients and benefit from each other's expertise.

Our ultimate goal is to ensure you can achieve and maintain the lifestyle you want.

Strong history

Richardson Wealth's significant national footprint is complemented by the backing of parent company James Richardson & Sons, Limited, offering employees and clients alike ongoing stability.

The Richardson name is one of the most respected names in financial services, with a legacy that dates back to the 1800's.

Richardson Wealth is one of Canada's largest independent wealth management firm, entrusted with over $26 billion in client assets*. We are committed to delivering unbiased and unparalleled wealth management solutions.

Our process

Identify your goals and objectives

To create the right plan for you, we develop a full understanding of your family background, priorities, goals and aspirations.

Personalized wealth and retirement plan

Based on your goals, objectives and resources, we will draft a personalized wealth plan and retirement plan that we believe best suits your needs.

Implement investment strategies

With your approval, we recommend and implement the best strategy to meet your needs. We ensure that we have fulfilled all your needs and that you are comfortable with our recommendations and strategy.

Monitor, evaluate, and review

The progress of your wealth plan will be thoroughly monitored, evaluated and reviewed on a regular basis. With your approval, we will adjust your strategy based on any changes to your lifestyle, goals, and objectives.

*as at April 30 2020

Why choose the Wronski Cann Group

Choosing an investment firm is a difficult decision for investors. It is one that should be made with the utmost care and discretion, as it impacts not only you, but your family and future generations.

It starts with a great Advisor. A professional who will put your financial goals above all other concerns and who has the wealth management talent and acumen required to help you reach them. Because when it comes to wealth, it's not about how much you have—it's about what it can help you achieve. It's about controlling what you can and protecting what you can't. And that's our expertise.

1 Our specialty

We have witnessed, navigated and weathered many market cycles. Through our experience as Portfolio Managers we have developed balanced and repeatable diversified investment strategies aimed to help you plan for and enjoy the lifestyle you deserve.

We create tailored wealth & retirement plans and implement strategies designed to deliver results while maximizing returns and minimizing risk.

2 Keeping you on track

It is a long journey and staying on track can be a challenge. We create a plan for success.

We work with you to create a personalized Lifestyle Roadmap and Wealth Plan and periodically review your income projection.

These tools and tailored advice provide you with financial security, while keeping you on track and ensuring your goals are met.

3 Trusted advisors

Financial and retirement planning is about more than the annual returns your investment funds are generating, it's about developing a relationship based on trust and integrity.

We hold ourselves to the highest standard of care and as such, our clients are the focus of everything we do.

4 Full disclosure

We ensure there is full disclosure of our investment recommendations and how we are compensated for the work that we do.

We aim to answer questions that you may have, specifically:

1) How are my investments doing?
2) How much are my investments costing me

5 Enhanced asset safety

Asset safety is a top priority at Richardson Wealth. That is why we implement corporate governance best practices and adhere to the stringent rules and regulations set by our regulatory bodies.
We have additional securities protection, with Lloyd's of London and CIPF, with combined coverage up to $2 million. We are committed to protecting what's important to you.

6 Best in-class research and in-house specialists

We have access to global investment research firms to help us identify opportunities and manage the impact of evolving situations.

We also have access to our in-house Tax & Estate Planning professionals such as lawyers and accountants, who help us address specific needs including tax and estate planning, insurance, and succession of businesses.

What clients are saying

Testimonials from our clients

"Kathleen has been our financial planner for many years. She is very approachable and knowledgeable and gives sound straightforward advice.

She combines her professional approach with a sensitivity to her client's personal situation and is always ready to assist and answer any questions.

As newly retirees, we met with Kathleen to map out our retirement plan. We are very confident that under Kathleen's guidance, we will have enough retirement income to thoroughly enjoy this new chapter in our lives.

We would highly recommend her and have referred others to her, with very good results."

- Ted and Gail, client for more than 20 years

"Kathleen has been our financial advisor for over twenty years. She has helped us plan for retirement by assisting us in making investment choices that increased our assets and that we were comfortable with.

Kathleen is very knowledgeable about finances and the markets and explains her recommendations in "layman's" language.

Now that we are retired, we are able to maintain our lifestyle with a portfolio that gives us tax efficient income. We feel very fortunate to have the benefit of Kathleen's financial expertise."

- Jean & Don, client since 1992

Your invitation

What to invest is just the start. There is also minimizing taxes, protecting yourself against adverse circumstances, and passing on your legacy.

That's where we can help. We not only help you achieve and maintain lifestyle you want; our goal is to provide you with financial security.

We can arrange a brief consultation via video, at a local coffee shop or your home with proper protocols in place. This is our opportunity to fully explore all aspects of your life to understand how we can assist you; at this stage we will listen to your concerns, ideas, and thoughts.

We invite you to call or email us to arrange a meeting and discuss your goals and aspirations.

Contact us

Toll Free: 1.866.205.3548

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