RICHARDSON Wealth

THE SUSAN O'BRIEN GROUP
WEALTH ADVISORY

NET WORTH
THINKING

My mission

I help business owners and senior executives who have worked hard to gain wealth step away from a check-box mentality and, instead, embrace Net Worth Thinking. My approach ensures they don't run out of money in retirement. In fact, I help people maintain their current lifestyle during their golden years, while also passing on wealth to future generations.

Meet Susan O'Brien

Do you worry about running out of money in retirement? Are you concerned about maintaining your lifestyle when you're no longer working? Do you wonder how you'll be able to pass on your wealth to your children and grandchildren in a way that encourages responsibility? Susan O'Brien is known for helping her clients with these very issues.

At her nationally recognized advisory firm, the Susan O'Brien Group, she provides clients with an innovative, collaborative approach to wealth management. As an entrepreneur and mother of four children, she has a passion for helping people not only build their own net worth but also ensure their wealth passes on to future generations. How? Well, she believes in bringing the vision you have for your retirement into reality by viewing your finances through the four Net Worth Thinking lenses: Focus, Function, Family and Freedom.

Susan has been featured in the Globe and Mail, and on CTV News and Global News.

Credentials

Chartered Investment Manager (CIM®)

Fellow of the Canadian Securities Institute (FCSI®)

Personal Financial Planner (PFP®)

Canadian Securities Course (CSC)

Life License Qualification Program (LLQP)

Conduct and Practices Handbook (CPH)

Portfolio Management Techniques (PMT)

Investment Management Techniques (IMT)

Wealth Management Essentials (WME)

Partners, Directors and Senior Officers Course (PDO)

Wealth Management Services Specialist for High Net Worth Clients

RICHARDSONWEALTH.COM/SUSAN.OBRIEN | 403.355.6053 | SUSAN.OBRIEN@RICHARDSONWEALTH.COM | in /IN/SUSANOBRIEN1/

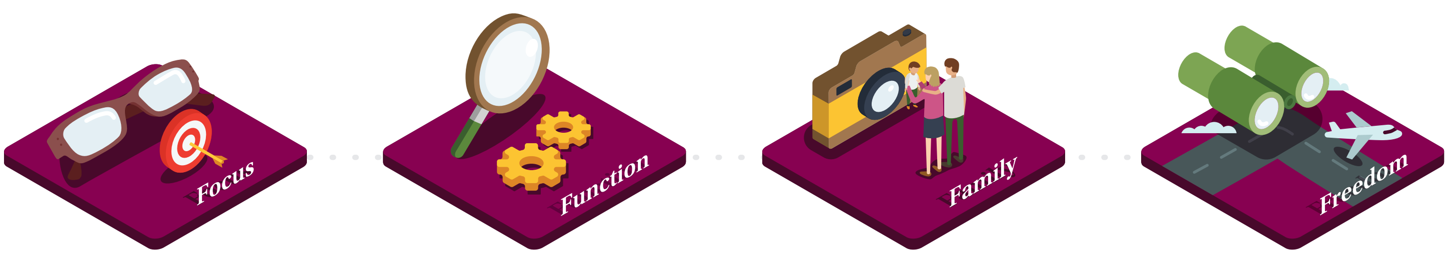
It’s a fallacy that the affluent are well served.

They may have their choice of fabulous hotels, spas, coveted seats at sporting events, and tables at five-star restaurants, but when it comes to making long-term decisions about their money, they’re not getting the help they need.

I believe a real financial plan starts at the end, not at the beginning and needs to be viewed through the four lenses of Net Worth Thinking: Focus, Function, Family and Freedom. It must also constantly be evolving instead of sitting on a shelf. Only then can it truly address your needs and goals and help you live the lifestyle you desire.

Focus, Function, Family, Freedom

By looking at all aspects of your financial life through a Net Worth Thinking Lens, we can create a fully realized, integrated, long-term financial plan. Consider it a 100-year relationship because we help you build intergenerational wealth and a lasting legacy.



Focus

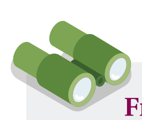
We facilitate the bigger conversations about values, family issues and goals. This lets us help clients focus on the right thing at the right time.

Function

We don’t believe in leaving a financial plan sitting on a shelf. Through our comprehensive process, we determine which levers to pull and implement strategies to help you achieve your goals.

Family

Wealth doesn’t happen in a vacuum and family plays an integral part in long-term financial planning. We bring your loved ones into the conversation.



Freedom

The definition of freedom is different for everyone. We dive deep to figure out what freedom looks like for you and we make sure you get there.

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