

"I offer my passion and expertise to provide you with a personalized approach to achieving your financial goals and dreams"

About Me

I am passionate about helping families and small business owners grow and protect their wealth by creating personalized financial plans designed to meet their goals. I have been in the financial services industry for over 7 years, 5 of those years in the credit union system.

I am a Bachelor of Management with Honours (Finance) graduate from the University of British Columbia and a CERTIFIED FINANCIAL PLANNER® professional. I have been a fully licensed advisor for over 6 years, coaching my clients on investing, retirement, insurance and estate planning.

I was born and raised here in Vernon, BC and I am a proud member of the Okanagan Indian Band. I love hiking in the Okanagan with my two Border Collies, Ducky and Stella, skiing up at SilverStar, and I am a die-hard Canucks fan!

My Approach to Helping You

I am a strong believer in building long-term, trusted relationships, and developing a deep understanding of my clients' financial needs and goals. I will take the time to get to know you and your family to create a personalized investment, risk management, retirement, insurance or estate plan aimed at helping you grow and protect your wealth.

I analyze your full financial picture alongside your goals and needs when creating financial strategies designed to achieve your unique goals. I practice due diligence and proven methods that make achieving long-term financial success simple while coaching you through the complex world of finance, through every stage of your life.



Taylor Belanger, CFP, BMgt (Hons) Financial Planner

- 7+ years of industry experience
- Bachelor of Management with Honours (Finance)
- CERTIFIED FINANCIAL PLANNER®
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