

YOUR FINANCIAL ADVISOR

# Todd Benson

*"I would like to be your financial coach. You can count on me to come up with a game plan that will help you reach your financial goals now, and in the future."*

## About Me

I have been in the financial services industry for over 15 years and specialize in providing clear, straightforward financial planning to individuals, families and small businesses.

Education and professional development are important to me. I completed my BA degree in Psychology at the University of Calgary in 1995, my Certified Financial Planners - CFP® designation in 2018 and my Chartered Life Underwriter (CLU) designation in 2024.

Above all, I am a devoted family man living in Vernon, with my lovely wife and two children. I also enjoy endurance sports, specifically triathlon, and have competed in all distances up to and including Iron distance races.

## My Approach to Helping You

I thrive on helping people, just like you, *navigate* through the media hype and short-term market noise by *focusing* on what is relevant and important to you.

Getting to know you well and understanding what you are trying to accomplish is critical in making meaningful recommendations, so I spend time learning about your priorities. By focusing on your goals, I can help with strategies from saving for children's education to planning for a secure retirement as well as protecting what's important to you. It is my responsibility to make sure I bring relevant qualifications to the table to provide you the very best support.



## Todd Benson, CFP®, CLU, BA

- 15 years of Experience
- Bachelor of Psychology
- Chartered Life Underwriter
- Certified Financial Planner®

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