

Top 8 Financial Advisors in Calgary, Alberta

2016 RANKING OF TOP WEALTH ADVISORS

Finding the Top Wealth Advisors in Calgary, Alberta

Are you looking for a quality financial planner in Calgary? Although it's easy to find a number of firms listed online, you may feel confused about which firms offer quality advice at a fair price.

Luckily, AdvisoryHQ has done the work to assist you in your search. This list provides the information you'll need to find a premier advisory firm in your area.

AdvisoryHQ has researched a wide range of wealth management firms in Calgary and has produced this list of Calgary's top eight advisory firms. Each financial planner described below advertises high quality advisors with years of experience in the financial industry.

Because everyone's needs and values vary, you may appreciate a certain firm's culture and services more than others. To ensure that we can assist you in finding a good fit, we have also outlined specialty services provided by each firm.

Hopefully we can help you choose a firm that suits your financial needs and expectations best. However, you should always follow up and do your own research before deciding to work with a particular firm.



AdvisoryHQ's List of the Best Wealth Advisors in Calgary, Alberta

List is sorted alphabetically (click any of the names below to go directly to the detailed review section for that advisor):

- [Canaccord Genuity Corp](#)
- [Hemisphere Capital Management](#)
- [Integrated Wealth Management](#)
- [Networth Management](#)
- [Northland Wealth Management](#)
- [Perron & Partners Wealth Management](#)
- [Vega Estate Planning Corp](#)
- [WealthCo](#)

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Top 8 Financial Advisors in Calgary, Alberta

Firms	Location
Canaccord Genuity Corp	Calgary
Hemisphere Capital Management, Inc.	Calgary
Integrated Wealth Management	Calgary
Networth Asset Management Inc.	Calgary
Northland Wealth Management	Calgary, Markham, ON
Perron & Partners Wealth Management	Calgary
Vega Estate Planning Corp.	Calgary
WealthCo	Calgary

Methodology for Selecting Financial Advisors in Calgary

What methodology did we use in selecting this list of best financial advisors in Calgary?

Using publicly available sources, AdvisoryHQ identified a wide range of wealth management firms that provide services in Calgary and the surrounding areas.

We then applied AdvisoryHQ’s “Breakthrough Selection Methodology” to identify the final list of top advisory firms that provide services to communities in and around Calgary.

Click here for a detailed review of our methodology: [AdvisoryHQ's Ranking Methodology for Canadian Financial Advisors.](#)

Detailed Review – Top Ranking Financial Advisors in Calgary, Alberta

Below, please find the detailed review of each firm on our list of top advisors and financial planners in Calgary. We have highlighted some of the factors that allowed these Calgary financial advisory firms to score so highly in our selection ranking.

Canaccord Genuity Corp Review

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

As one of the oldest and largest wealth management firms in Calgary, [Canaccord Genuity](#) has a lot to offer its clients. In total, Canaccord handles [\\$31.3 billion in assets under management](#) and offers a full range of domestic and international investment options.

Below are key factors that enabled Canaccord Genuity Corp to rank as one of 2016's top financial advisors in Calgary, Alberta.

Company History

Canaccord was founded in 1950 as a venture capital firm called Hemsworth, Turton & Co. In 1968, now under the name Canarim Investment Corporation, they become the largest trader on the Vancouver Stock Exchange. As of 2005, the firm is named Canaccord Capital, [employs 1200 people](#), has become a full service financial advisory firm, and is publicly traded on the Toronto and London Stock Exchanges.

By 2013, the firm has linked its international presence under the name Canaccord Genuity Corp. The firm's reach extends to Canada, Europe, Australia, and Asia.

Comprehensive Services

Canaccord offers a full range of financial services:

- Financial and estate planning
- Insurance services
- Charitable giving
- Tax

- Investment planning
- Retirement
- Pension plans
- Education planning

CC Wealth Assessment

The Canaccord website describes that before creating your financial plan and building your portfolio, a Canaccord advisor will first provide a “CC Wealth Assessment.” This assessment is what the advisor uses to learn about your personal needs, goals, and limitations so that together you can build an individualized financial plan.

CC Wealth Strategy

After conducting a CC Wealth Assessment, their website writes that an advisor will determine which products and services are best suited for your needs. They will design an individualized investment and financial plan.

Investment Options

Fixed Income Securities

Canaccord’s website [states](#) that you may potentially invest with federal, provincial, municipal, or corporate bonds. Other fixed securities include structured and floating rate loans, money markets, and guaranteed investment certificates.

Canaccord [writes](#) on their website that these can potentially make good investment choices because they are more predictable than equities and are often paid out first in the event of company insolvency.

Equities

Canaccord [explains](#) that shares of a publicly traded company can make wise investments because they often pay dividends and are easily bought and sold. An advisor will suggest equities based on your particular needs. Canaccord invests in areas including but not limited to:

- Metals and mining
- Energy
- Agriculture
- Technology

- Media and telecommunications
- Paper and forestry
- Infrastructure
- Healthcare
- Defense

Mutual Funds

Canaccord [writes](#) that mutual funds are liquid and diversified in nature and often offer low minimum investment options. Specifically, a mutual fund is a professionally run bundle of varied investments. The diversity of investments helps limit risk in a volatile market.

Investment Pools

An advisor at Canaccord may potentially suggest an [investment pool or structured product](#). These include a mix of equities and fixed income investments or other investments such as derivatives or hedging strategies. Canaccord explains that these offer further diversification and personalization of your portfolio.

Public Venture Capital

Also offered are small business and new company investments. Canaccord [explains](#) that these can potentially offer higher growth potential, but this benefit also comes with a higher risk as these companies are less stable in the markets.

Hemisphere Capital Management Review

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Founded by Jim Aronitz in 1993, [Hemisphere](#) has become a successful Calgary financial advisory firm with over [\\$300 million in assets under](#) management and over a dozen employees. As an independent financial planner in Calgary, Hemisphere advertises strong customer service in a personalized environment.

Below are key factors that enabled Hemisphere Capital Management to be rated as one of 2016's top financial firms in Calgary, Alberta.

Boutique Firm

Boasting about the total assets under management isn't a priority to Hemisphere. Instead, they focus on offering clients one-on-one, individualized customer service in a boutique setting. If you are looking for a firm with no bureaucracy and strong customer service, Hemisphere may be a great match for you.

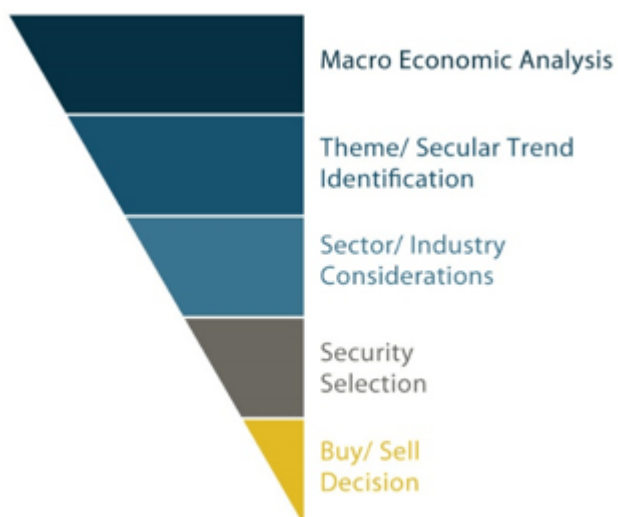
But don't confuse boutique with inexperience – Hemisphere has been in business for almost twenty years, and their advisors have a [combined 80 years](#) of experience in the financial industry.

Independent Advice

Hemisphere is also an independent firm, so they are not affiliated with any larger financial institution.

Five Stage Investment Approach

Advisors at [Hemisphere](#) describe their investment approach as conservative, yet flexible. They invest using a [5-Step approach](#):



Macro Factor Analysis

Hemisphere watches the status of global factors influencing the economic markets on a regular basis. This provides the lens for making investment decisions.

Theme Identification

Advisors also research current investment themes to determine pathways in investment rates, economic growth, corporate earnings, currency trends, capital flows, and more. These themes are integrated with macro factor analysis for stronger investment choices.

Industry Considerations

With the information provided in the steps outlined above, advisors then identify particular sectors in which to invest or avoid.

Security Selection

Before selecting a particular company within favorable sectors, Hemisphere applies the following [considerations](#):

- Is the company outlook stable and sustainable? How does the company rank compared to competitors?
- Are company returns predictable?
- What are the internal company particulars like? Does the company have good management?
- What is the company worth?

Buy/Sell Decision

Hemisphere's website states that, ultimately, they will only invest in a company if its stock price is less than the "range of fair value." That fair value range is determined by generating an estimated intrinsic value of a company.

Hemisphere believes this strategy optimizes returns. Their site [outlines](#) 5 sets of "undervalued" companies with which they would recommend you invest:

- **Fallen Angel:** A normally successful company that has had a downturn. This means they are trading at a lower level compared to their long-term potential.
- **Hidden Gem:** A company that hasn't yet been noticed by mainstream investors but Hemisphere acknowledges its potential for long-term returns.

- **Net Asset Value Play:** Stock price is much lower than the company's overall worth.
- **Industry Laggard:** A company that trades much lower than other competitors in its industry.
- **Special Situation:** Other companies or firms with unrecognized potential.

Private Portfolio Management

Hemisphere also offers [Private Portfolio Management](#) services to individuals, holding companies, and trusts and estates with [assets of more than \\$750,000](#). Private Portfolio clients enjoy quarterly update meetings and customized investment portfolios, including:

- Government and corporate bonds
- Preferred shares
- Dividend paying stocks
- Opportunistic stock positions

Integrated Wealth Management Review

This Calgary-based advisory firm takes a holistic approach to financial planning. [Integrated Wealth](#) sees financial planning as a piece of the puzzle in the larger picture of your life. They strive to get to know you personally so that they can link your financial habits and actions with your goals and dreams.

They also believe that once you have your finances in order, you'll be able to shed unnecessary anxiety and fears about the future and more fully enjoy your life. This devotion to your happiness is exemplified in Integrated Wealth's promise to limit services to [100 families maximum](#).

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Integrated Wealth Management to rank as one of 2016's top financial advisors in Calgary, Alberta.

Mindful Wealth Management

Integrated Wealth understands that your finances are not the avenue to happiness, but merely part of a larger picture so that you can enjoy life to its fullest. Integrated works with your finances so that you can focus on what really matters—purpose, happiness, and family.

Their site states that advisors will learn about your overall life goals and tailor your financial plan to achieve your desired outcome. Integrated Wealth works with outside experts, like lawyers and CPAs, to offer a holistic, stress-free approach to wealth management.

Integrated Wealth Management Planning Approach

Integrated Wealth describes their step-by-step [planning process](#) with clients:

Discovery Process

In this meeting, you'll sit down with an advisor to see if your financial goals can be fulfilled by services offered at Integrated Wealth. Your advisor will evaluate your overall "Life Goals" and begin to understand your lifestyle, personality, and values.

Information Gathering

Next, an advisor will dive into the state of your financials. They will review:

- Net worth
- Household cash flow and debt management
- Pensions and investment portfolios
- Tax planning strategies
- Business structure
- Risk management tools
- Estate planning documents

Construction of the Comprehensive Assessment

An advisor will then create a report of your financial health and determine where you're headed based on your current lifestyle.

Integrated believes this presents to you a clear picture of your habits and financial routines so that you can more accurately determine what your goals truly are and if anything needs adjusting.

Creation and Review of the Master Plan

Armed with the knowledge gained in previous meetings, an advisor then begins to set up a “Master Plan.” This report will establish a link between your financial lifestyle and your financial goals.

Implementation of the Master Plan

After you decide you’re ready to move forward with the Master Plan, an advisor will put the plan into motion. The correct outside managers will be hired, investments made, and outside connections such as accountants and lawyers established.

Ongoing Monitoring and Updating

Integrated advertises ongoing communication and customer service with clients. Integrated Wealth offers scheduled face-to-face meetings, additional meetings in the event of unexpected financial changes, yearly reports, exceptional customer service, and on-going education in financial matters.

Fee Transparency

Integrated Wealth states that they operate with total [transparency](#) in fees. They charge by percentage of portfolio size, not by investable accounts. As an [independent firm](#), Integrated Wealth serves you first.

Networth Management Review

Founded in 1995, [Networth Management](#) is a boutique-sized wealth management firm in Calgary. As part of an independent and boutique firm, advisors are not influenced by any bureaucracies. If you are looking for a firm with a personal touch, Networth may be a perfect match for you. They also serve a limited number of clients to ensure quality financial and investment services.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Networth Management to rank as one of 2016’s top investment advisors in Calgary, Alberta.

Value-Based Financial Planning

Networth explains that they offer [value-based financial planning](#) because they seek to know your personal values and goals. They strive to offer you financial piece of mind by helping you to both achieve and sustain your dreams and goals. To Networth, value-based financial planning means:

- Honest and independent advising
- No third-party affiliations
- Open door policy
- Personalizing services for each client
- Putting promises in writing
- Treating all clients and employees with the respect they deserve

Understanding Women's Unique Financial Needs

Networth also prides itself on recognizing the unique financial needs of women. They offer [services](#) filtered through a female-focused lens rather than ignoring or denying the particular financial needs of women.

Networth may make a perfect match for you if you are looking for a wealth advisory firm in Calgary that acknowledges the particular needs of women and doesn't lump female clients with men or assume that women are cared for under the wing of a man.

Advisors recognize these differences and serve clients accordingly, when appropriate. Such particularized services often include:

- Divorce
- Ensuring settlement payments
- Tax issues
- Child rearing
- Death of spouse
- Preserving wealth
- Special needs children
- Unexpected family illness
- Aging parents

Community Involvement

Networth prides itself on staying connected with the Calgary community. They [contribute](#) to two local charities:

[World Vision](#): a charitable organization that fights poverty by focusing on its root causes.

[Build it Forward Foundation](#): focuses on helping widows, and others in emergency situations, in North America and abroad. They seek to foster neighborly connections to spur community-based solutions.

Unbeatable Customer Service

Networth offers a high level of customer service and fosters long-term relationships with clients. Some examples of this premier level customer service include:

Independent Firm

They operate as an independent firm, which means they are not owned by an outside or larger financial institution.

Financial Road Map

Networth's web site explains that every client will receive a financial road map, which is financial planning tool designed to organize your overall goals and financial values.

Comprehensive Services

Their site also describes how advisors take a holistic approach and ensure that a checklist of [143 points](#) is considered for each client. This promotes long-term relationships and maximizes returns. Other services include:

- Strategic tax planning
- Open door policy
- Multi-generational wealth planning
- Business strategies
- Succession planning

Northland Wealth Management Review

[Northland Wealth](#) is a Calgary-based firm offering over [150 years in combined advisor](#) experience in an independent boutique environment. The firm describes that they preserve boutique-sized benefits, like getting to know your family, meetings at your home or in the office, working with more than one advisor on a personal level, and a high level of confidentiality.

However, Northland also maintains that they offer the benefits of a larger firm, such as a large and stable team, premier investment strategies, coordination between advisors, and access to global leaders in investing.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Northland Wealth Management to rank as one of 2016's top financial advisors in Calgary, Alberta.

Independent, Client-Centered Approach

Unlike some other institutions like banks and trust companies, Northland offers independent advice.

Core Values

Advisors at Northland adhere to [five core values](#):

- Ethics and accountability: Avoiding conflicts of interests
- Adherence to beliefs: Seeing the whole picture above and beyond money matters
- Critical evaluation: Offering the best solutions possible
- Responsibility: Caring about clients and their families
- Peace of mind: Making sure clients sleep easy at night knowing their finances are cared for

Planning Solutions and Strategies

Northland explains that they offer a high level of customer service. Their site outlines the following [guidelines](#) they utilize when working with clients:

Communication

Northland offers regular communication with clients. Clients consistently receive update reports and phone calls regarding your portfolio and market conditions. You get monthly reports from your bank or trust company and quarterly reports from Northland.

Northland also offers an annual report of total gains and losses for tax purposes, a report of dividend payouts, and an overall performance summary. If you'd prefer these meetings be in person, a Northland advisor will make the time to sit down with you and discuss the status of your portfolio.

Governance

Northland [only receives fees from clients](#). As an independent firm, they only receive fees from you and not from any other third party affiliations. Northland states that you'll receive advice without any conflict of interest and without any outside influences.

Understanding You

Northland promotes an open door policy and keeps consistent communication with all clients and their families. This is to promote individualized treatment and personalized investment strategies. Your advisor will strive to stay connected with you and your ongoing needs as they change over time.

Planning Services

The large-firm aspect of Northland may benefit you when building a portfolio with an advisor.

They offer top-notch software and years of experience that will allow you the potential to maximize returns. Further, they describe their approach as simplified so as to avoid unnecessary complications with your investment strategy.

Solid Team

Northland offers over [150 years in combined advisor experience](#). Advisors coordinate together in a team-centered environment to ensure the highest quality investment and planning services.

As a client at Northland, you'll work with both a portfolio manager and a relationship manager. The portfolio manager will work on your portfolio and

investments, while the relationship manager will build and establish a stable connection between you and the firm.

Strong Relationships

Portfolio and relationship managers strive to know you better than the typical financial advisor. They want to know you and your family personally in order to truly understand your financial needs, expectations, and concerns.

Perron and Partners Wealth Management Review

[Perron and Partners Wealth Management](#) is a financial advisor in Calgary founded by Gary Perron in 2013. The firm now consists of 11 advisors and support team members and offers financial advice to individuals as well as institutions. Gary founded Perron and Partners to offer independent, unbiased financial advice to the Calgary community. Advisors boast a collective 100 plus years of experience, so you'll receive expert advice in a boutique, personalized environment.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Companies

Below are key factors that enabled Perron and Partners Wealth Management to be rated as one of 2016's top financial firms in Calgary, Alberta.

Planning Process

Perron and Partners seeks to provide common sense advice without unnecessary complications. Advisors use a [four-step process](#) with each client:

Shared Understanding

During the first meeting, your advisor will learn your unique needs and expectations. They will also explain Perron's investment strategy and processes.

Developing an Investment Plan

Once advisors have learned about the current state of your financials, expectations, and tolerance for risk, they will begin the process of putting together your investment strategy.

Review and Forward Thinking

After the beginning stages of your relationship have solidified, Perron advisors will begin to educate you about the investment process. You'll have the chance to ask any questions regarding investment decisions, implementation, and goals.

90-Day Principle

Once you give the green light, your advisor will take action and put the investment plan into play within 90 days.

The relationship doesn't end once investment decisions have been made and the portfolio established, though. Going forward, you will receive updates from a relationship manager at least every 90 days.

Independent Advice

Perron prides itself on their status as an [independent firm](#). They enjoy operating as a firm that isn't limited by corporate directives, held to particular guidelines, or limited to in-house resources or products. Perron feels their independent status also allows them to conduct more extensive research, which opens the door for higher performing investments.

Retirement Planning

Perron specializes in [retirement planning](#) for both individuals and business owners. Your advisor will:

- Maintain your portfolio so that your investments match your retirement needs
 - Keep your plan relevant to retirement
 - Establish a succession plan
 - Communicate regularly and educate you and your family with consistent contact and newsletters
-

Vega Estate Planning Corp Review

[Vega Estate Planning Corp](#) was founded by Yar Kolomijchuk, a Calgary native. Yar brings over 22 years of experience in the insurance and financial planning industry and works with a solid team of experienced advisors. Vega will organize your financials in-house and may also match you with outside specialists on an as-needed basis to ensure that you receive the best services possible for your particular financial needs.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Vega Estate Planning Corp. to rank as one of 2016's top financial advisors in Calgary, Alberta.

Independent Financial Planning

Vega Estate Planning Corp is an independent firm, so they don't operate with influences from a potentially conflicting affiliated institution. This promotes a fairer environment for the client.

Wealth Planning Services

Vega provides comprehensive financial planning services:

- **Retirement:** An advisor will evaluate and project where you are currently headed based on your saving and spending habits, and then create a plan that caters to your personalized needs. Your advisor will also consider tax issues to ensure that you won't miss out on any opportunities for increased savings.
- **Risk Management and Life Insurance Review:** Vega will also evaluate the state of your insurance coverage to ensure you and your family are adequately protected in the event of an unplanned occurrence.
- **Vega Estate Plan:** This covers your will and power of attorney paperwork, executor instructions, and completes all open-ended issues related to your estate.

Vega also offers counselling for pension plans, insured annuities, estate bonds, and private investments.

Alternative Investments

Vega also stresses the importance of making [alternative investments](#) not connected to equities or fixed-income strategies. Such alternative investments can potentially maximize returns and decrease risk in an unpredictable market.

Vega suggests alternative investments such as:

- Land banking
- Real estate
- Mortgages
- Private equity
- Dividend yield products
- Flow through funds
- Segregated funds
- Exempt market funds

WealthCo Review

[WealthCo](#) is a financial planner in Calgary offering wealth planning, investment management, and risk management services. Together, their solid team of ten advisors brings over 100 years of experience in the financial planning industry. WealthCo offers the skill and experience you're looking for in a Calgary investment advisor.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled WealthCo to rank as one of 2016's top financial advisors in Calgary, Alberta.

Wealth Enhancer Planning Services

WealthCo applies a [five-step process](#) to wealth planning:

1. [Vision Blueprint](#)

Advisors put together an outline of your wealth planning needs and goals.

2. Personal Financial Profile

You help your advisor learn about your particular needs and expectations. WealthCo does not offer clients pre-packaged services; they strive to know you personally before making suggestions and building your financial plan.

3. Wealth Expander

Advisors apply skill and experience to create a plan that will maximize savings and build you a better financial future.

4. Event Navigator

Next, WealthCo gets moving to put your plan into action.

5. Wealth Enhancer Review

WealthCo will stay in contact with you and stay current with your needs and goals and make any necessary adjustments to your financial plan over time.

WealthCo Asset Management

This firm strongly emphasizes the [importance](#) of diversifying investments. WealthCo's site explains that while the typical ratio for diversification calls for a 60/40 investment split, WealthCo takes diversification further.

Advisors suggest that aside from a 40/60 ratio of stocks and bonds, you should also invest in alternative investments, first mortgages, equities, stock options, and real estate. This helps protect you from an unpredictable market and helps you work toward your goals and maximize returns.

WealthCo Risk Management

This firm also offers [several packages](#) that address your risk management needs. Such insurance packages include:

- Life insurance
- Individual disability insurance
- Long-term care coverage
- Insured annuities
- Private health services plan

- Registered insured annuities
 - Critical illness insurance
-

Conclusion - Top 8 Financial Advisors in Calgary, Alberta

With so many firms offering financial planning services, the decision to sign with a particular firm is intimidating. The advisor you choose will comb through your personal life and make suggestions about not only your finances but your lifestyle as well. Your advisor will get to know you very closely, and you will have to put a lot of personal information out on the table to be scrutinized. The decisions you and your advisor make will affect both you and your family.

You don't want to give this responsibility to just anyone. It needs to be someone you can trust.

This list provides a breakdown of the services offered at eight of the best wealth management firms in Calgary. All of the firms bring high-level skills and experience to the table. However, the particular firm you choose depends on your individualized lifestyle and investment needs.

Be sure to read carefully and do your own research so that you're confident the firm you choose aligns with your personal beliefs, values, and financial goals. Most firms offer a free consultation, so you can do further research and set up an initial face-to-face meeting with a "short-list" of firms before finally settling with an advisor.

If you have questions, comments, or tips about this "Top 8 Wealth Management Firms in Calgary, Alberta" article, send us an [email](#). Follow us on social media to be the first to hear about major economic news stories.

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Cheers,

AdvisoryHQ Team