
10 Best Financial Advisors & Wealth Management Firms in Vancouver, BC, Canada | 2018 Ranking

2018 RANKING AND REVIEWS BEST FINANCIAL PLANNERS IN VANCOUVER

2018 Ranking of Best Vancouver Advisors. What Should You Look for When Hiring a Vancouver Financial Advisor?

Financial advisors can help clients in any number of ways, from creating the ideal investment portfolio for their needs to helping them with business-related issues, such as succession planning.

Essential to choosing a Vancouver financial advisor is a sense of trust, transparency and expertise, particularly if you have a specific or complex financial situation.

The following are specifics to keep in mind as you select a financial advisor in Vancouver:

- According to CBC, there are as many as 100,000 people in Canada who describe themselves as financial consultants, advisers or planners, but they're not all the same. The first step when hiring a Vancouver financial advisor should be an understanding of your specific needs, as many firms specialize in one area or another.
- When people start their search for a financial advisor in Vancouver, they often forget one of the most important elements—a personal connection, or at least a feeling of comfort. You'll need to feel comfortable sharing your personal financial life with a Vancouver financial advisor.
- While financial planners in Vancouver may have what seems like an alphabet soup of letters beside their name, the two most important credentials tend to be CFP® (Certified Financial Planner) and RFP (Registered Financial Planner).

For a discussion on the differences between fee-only versus fee-based firms (and why our review favors fee-only wealth management in Vancouver), see the section below.



Award Emblem: Top 10 Best Financial Advisors in Vancouver, BC

Top 10 Best Financial Advisors in Vancouver, BC, Canada | 2018 Brief Comparison & Ranking

Best Wealth Management Firms in Vancouver	Highlighted Features	2018 Ratings
Cypress Capital Management	Clients have access to exclusive Cypress Pooled Funds	5
Elevate Wealth Management	Discretionary investment platform	5
Macdonald Shymko & Company	Highly certified financial advisory team	5
Money Coaches Canada	7 Stages of Financial Well-Being®	5
Nicola Wealth Management	Private investment pools for greater diversification and exposure to asset classes	5

Oldum Brown	Disciplined, value-based approach to investing	5
Pacific Spirit Investment Management, Inc.	Highly accredited team of Vancouver financial advisors	5
RGF Integrated Wealth Management	Comprehensive suite of financial services	5
T.E. Wealth	Dedicated Aboriginal Services practice	5
Chartwell Financial Group	Insurance planning expertise	3

Table: Top 10 Best Financial Advisors in Vancouver | Above list is sorted by rating

Fee-Only vs. Fee-Based Vancouver Financial Advisors

When it comes to evaluating financial advisors in Vancouver, there are typically two types of firms to consider: fee-only and fee-based advisors.

How do you know which type of Vancouver wealth management firm is right for you? Below, we'll provide you with a brief overview of everything you need to know about the differences between fee-only and fee-based investment advisors in Vancouver.

Fee-Only

When an investment firm or a financial advisor in Vancouver says that they are "fee-only," this means that they *do not* accept commissions or third-party referral payments.

Because an advisor's only source of income comes from the client, a fee-only pricing structure minimizes the inherent conflicts of interest that come along with recommending and selling investment products.

In short, a fee-only financial advisor in Vancouver is in a better position to act solely in the interest of their clients.

Fee-Based

Fee-based firms will receive *some* direct compensation from clients but are free to accept commissions from the companies who provide their financial products.

While a fee-based structure does create some potential conflict, many fee-based firms are also fiduciaries, which often counteracts the potential for conflict.

Wealth management firms in Vancouver that adopt a fiduciary commitment are legally responsible to fully disclose any conflicts of interest and are required to put the interests of their clients ahead of their own.



Best Financial Advisors in Vancouver, BC

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services and products that are ranked on its various top-rated lists?

Please click here “[AdvisoryHQ's Ranking Methodologies](#)” for a detailed review of AdvisoryHQ's selection methodologies for ranking top-rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Best Financial Advisors in Vancouver, British Columbia

Below, please find the detailed review of each firm on our list of top advisors and financial planners in Vancouver, BC. We have highlighted some of the factors that allowed these firms offering wealth management in Vancouver to score so high in our selection ranking.

Click on any of the names below to go directly to the review section for that firm.

- [Chartwell Financial Group](#)
- [Cypress Capital Management](#)
- [Elevate Wealth Management](#)
- [Macdonald Shymko & Company Ltd.](#)
- [Money Coaches Canada](#)
- [Nicola Wealth Management](#)
- [Odlum Brown Limited](#)
- [Pacific Spirit Investment Management, Inc.](#)
- [RGF Integrated Wealth Management](#)
- [T.E. Wealth](#)

Click below for previous years' rankings:

- **2016 Review:** [Top 11 Vancouver Financial Advisors](#)
- **2017 Review:** [Top 10 Best Financial Advisors in Vancouver](#)

Chartwell Financial Group Review

Founded in 1994, [Chartwell Financial Group](#) is an independent financial advisor in Vancouver and Surrey that provides financial planning, risk management, investment, and retirement services.

We could not verify whether Chartwell is a fee-only or fee-based Vancouver financial planner. As always, we recommend verifying compensation structure before partnering with any financial advisory firm.

Key Factors that Enabled Chartwell Financial Group to Rank as a Top Financial Planner in Vancouver

Detailed Process

Adhering to a company goal of providing clients with quality advice backed by excellent service, Chartwell Financial Group employs a detailed, client-centric financial planning process. This process includes:

- **Discover**—Your Vancouver financial advisor will facilitate open, active discussions while examining current finances, upcoming life events, and sharing useful ideas and actionable tips
- **Evaluate**—Looks at your complete financial picture, including current portfolio, group benefits, group pension, and insurance products

- **Recommend**—Your Vancouver financial planner will provide a detailed plan with expert advice and recommendations
- **Execute**—Clients receive a detailed investor statement, while Chartwell purchases all insurance and investment products
- **Review**—Your Vancouver financial advisor will periodically review and adjust your plan as needed to account for changing circumstances

Full Suite of Group Benefits

For business owners, putting together a solid benefits package can be a time-consuming and difficult process. By partnering with the Vancouver financial advisors at Chartwell, business owners can have access to:

- Life insurance
- Disability insurance
- Health insurance
- Dental coverage
- Vision coverage
- Critical illness coverage
- Group retirement and savings plans

No matter how large or small your business is, Chartwell Financial Group is committed to finding the best quotes and the best rates, saving clients' money over the long-term.

Rating Summary

With an experienced team, a client-centric process, and clear expertise in insurance products, Chartwell Financial Group provides high levels of value for individuals and businesses alike.

However, our review did find some opportunities for improvement in how specific services are communicated. For example, although the firm states that evaluating portfolio holdings and identifying investment products is part of their process, there is no mention as to their investment philosophy or approach.

Similarly, it's difficult to determine exactly what types of estate planning services are available through Chartwell, which could make it challenging for potential clients to fully evaluate the firm.

By adding information about their philosophies and specific service offerings for investments and estate planning, Chartwell Financial Group could easily improve both their value proposition to new clients and their rating as a top financial advisor in Vancouver.

See Also: Best Financial Advisers in Leeds, UK

Cypress Capital Management Review

[Cypress Capital Management](#) is a [fee-only](#) firm offering wealth management in Vancouver. The firm caters to high-net-worth individuals, families, businesses, and foundations.

Key Factors that Enabled Cypress Capital Management to Rank as a Top Vancouver Wealth Management Firm

Credentialed with Low Client-to-Advisor Ratios

Cypress features eight financial advisors, each of whom holds a CFA designation along with an average of 20 years' experience.

Additionally, their certification and ongoing education keeps Cypress advisors abreast of the latest portfolio management research. As such, clients benefit from both their tenure in the field and their training in the classroom.

Other industry designations achieved by Cypress advisors include:

- Chartered Accountant (CA)
- Master of Business Administration (MBA)

Portfolio Fundamentals

The focus for clients is what Cypress believes should hold true for all long-term investments. That focus at Cypress is on the fundamentals.

Portfolio fundamentals at Cypress include:

- The only way to realize higher returns is through accepting more volatility
- The risk associated with volatility is mitigated through two factors: diversification and time.
- The main factor that determines portfolio returns is asset allocation rather than individual stocks.
- For long-term investors fixed income investments may not preserve their purchasing power.
- Market timing is ineffective.
- Investments aren't made without determining the investor's objective and relating the investment to the investor's overall assets.

Rating Summary

As a fee-only firm with a fiduciary commitment, Cypress Capital Management provides clients with transparency and trust, building a strong foundation for long-lasting financial management relationships.

With an experienced team, a client-centric philosophy, and a comprehensive investment approach, Cypress Capital Management is one of the best investment firms in Vancouver to consider partnering with this year.

Elevate Wealth Management Review

[Elevate Wealth Management](#) is a Vancouver investment advisory firm providing investment management, financial planning, and risk management services.

We could not confirm whether Elevate Wealth Management is a fee-only or fee-based financial advisor in Vancouver. As always, we recommend verifying compensation structure before partnering with any financial advisory firm.

Key Factors that Enabled Elevate Wealth Management to Rank as a Top Wealth Management Firm in Vancouver

Discretionary Investment Platform

To help their clients grow their assets while simultaneously managing wealth, the investment advisors in Vancouver at Elevate Wealth Management utilize a discretionary investment platform.

A few elements of the [discretionary investment platform](#) at this top Vancouver wealth management firm include:

- Clients are treated equally, and all trades are done at the same price on the same day
- There is a wider range of investments to choose from. This includes ETFs, stock and other investments designed to offer better possible returns and more downside protection.
- Fees are not part of the investments that are recommended. What this means is that clients pay a flat fee, regardless of investment type, eliminating the possibility for biased decisions and ensuring objectivity.

A Team with Many Professional Designations

When a financial advisor in Vancouver has a team that represents a variety of professional designations, this shows a commitment to staying on top of evolving trends and industry best practices.

Elevate Wealth Management does this well, and it's yet another contributing factor into making them a high-grade Vancouver financial planner.

Some of the designations that can be found among their Vancouver financial advisory team are as follows:

- Chartered Investment Manager (CIM®)
- Certified International Wealth Manager (CIWM®)
- Chartered Life Underwriter (CLU)
- Chartered Financial Consultant (CFC)
- Certified Financial Planner (CFP®)
- Certified Professional Consultant on Aging (CPCA)
- Fellow of the Canadian Securities Institute (FCSI)
- Certified Insurance Practitioner (CIP)
- Level 1 Life Insurance License
- Level 2 Life Insurance License

Rating Summary

What makes Elevate truly distinctive is their team approach. Each investment advisor has their own unique style—but when those styles come together, Elevate believes that this is the best approach to a constantly evolving financial environment.

With a highly credentialed team, a discretionary platform, and a client-first perspective, Elevate Wealth Management is one of the best financial advisors in Vancouver to consider partnering with this year.

Don't Miss: Top Financial Advisers (IFAs) in Manchester and Cheshire, United Kingdom

Macdonald Shymko & Company Ltd. Review

Founded in 1972, [Macdonald Shymko & Company Ltd.](#) (MSC) is a boutique financial advisor that provides financial planning and portfolio management.

Among its track record of longevity, stability, and client success, MSC also was one of the first independent, [fee-only](#) financial advisors in Vancouver.

Key Factors that Enabled Macdonald Shymko & Company Ltd. to Rank as a Top Financial Advisor in Vancouver

Conflict-Free Advice

As a fee-only firm, clients receive truly conflict-free advice. Your Vancouver financial advisor at MSC won't make recommendations that have been influenced by commissions, incentives, kickbacks, or any other "soft dollar" compensation.

The only compensation received by the advisors at MSC comes from a percentage of AUM, or Assets Under Management. This top Vancouver wealth management firm operates transparently by informing you immediately should a conflict-of-interest arise.

This fee-only structure provides a solid foundation of trust and transparency, encouraging positive long-term relationships with each client.

Highly Certified Team

Each advisor at MSC is designated as a Registered Financial Planner (RFP), Canada's top financial planning certification. Uniquely, RFP is the only designation in Canada that requires advisors to prepare a comprehensive financial plan that is evaluated and approved by other RFPs.

Not only are they knowledgeable and trained in financial planning best practices, but the Vancouver financial advisors at MSC adhere to a stringent fiduciary commitment, operating with the highest level of transparency and client-centric service.

MSC requires all advisors to undergo continuing education in an effort to stay on top of the financial planning services industry, including changes in laws, taxes, and best practices.

Other designations found among the MSC team include:

- Trust & Estate Practitioner (TEP)
- Certified Financial Planner (CFP)
- Certified Investment Manager (CIM)
- Master of Business Administration (MBA)
- Chartered Professional Accountant (CPA)
- Certified Management Accountant (CMA)



Macdonald Shymko & Company - Vancouver, BC

Rating Summary

As a top fee-only financial planner in Vancouver, MSC provides clients with access to strategic partners that specialize in alternative financial challenges, like real estate investment and money management consultation.

With a fee-only structure, comprehensive financial planning services, and a highly certified team, Macdonald Shymko & Company is one of the best financial advisors in Vancouver to consider partnering with this year.

Money Coaches Canada Review

[Money Coaches Canada](#) (MCC) is somewhat unique from many of the other names on this ranking of the best wealth management firms in Vancouver.

Rather than being a financial management firm in the traditional sense, MCC is actually a network of money "coaches" located throughout Canada.

Money Coaches Canada is the country's leading [fee-only](#) financial planning and coaching company, and they've helped clients with a range of personal objectives including reducing debt, saving more, improving cash flow and investing for short and long-term goals.

Key Factors that Enabled Money Coaches Canada to Rank as a Top Vancouver Financial Advisor

Pay Only for Advice

MCC advisors don't sell financial products, eliminating commissions and the potential for conflicts of interest to arise. Instead, MCC charges fees based on the service(s) utilized. There are no hidden fees, and you know from the start exactly what you're getting.

As an additional benefit, clients pay only for advice, and not from discretionary management of their finances. What does this mean for you? You pay less than you would with a money manager.

Your Vancouver financial advisor at MCC uses your input, needs, and goals to devise a customized plan; what you do with the plan from there is up to you.

This is particularly attractive to clients who can't afford the minimums required by most wealth management firms. It also appeals to the self-starter, someone who wants to manage their own investments in a cost-efficient manner but needs a bit of guidance to get started.

7 Stages of Financial Well-Being®

The Vancouver financial advisors at MCC strive to guide their clients through a series of common financial phases, called the 7 Stages of Financial Well-Being. These include:

- **Financial Chaos**—In this stage, you may experience emotions like guilt or fear, and could be struggling to pay bills on time or establish a savings account
- **Financial Avoidance**—Your Vancouver financial advisor will help you get through feelings of frustration or confusion from disorganized finances and little financial control/knowledge
- **Financial Awareness**—In this phase, you will begin creating debt management and cash flow plans to start taking control of your finances
- **Financial Stability**—Once the basic foundation is set, you can start evaluating threats and put crucial safeguards in place
- **Financial Security**—Ensures that you are making the most of your money through investment, estate, and tax planning strategies
- **Financial Freedom**—Regular check-ins with your Money Coach can help ensure that maintenance updates are made as needed

- **Financial Fulfillment**—In this final phase, you will be confident that your money is in alignment with your needs and your values



Money Coaches Canada

Rating Summary

As a top financial planner in Vancouver, Money Coaches Canada provides clients with a unique alternative to the traditional wealth management model.

Fees, services, and even communication styles are tailored completely to the needs of the client, making expert financial advisement both accessible and affordable, particularly for beginners or for those that prefer to greater control over their financial management.

With a talented team of advisors, a fee-only structure, and a client-centric approach, MCC is one of the best investment advisors in Vancouver to consider partnering with this year.

Related: Top Financial Advisors in St. Louis, MO

Nicola Wealth Management Review

[Nicola Wealth Management](#) is a financial advisor in Vancouver that services high-net-worth individuals and their families with a primary focus on entrepreneurs, business owners, and executives.

As a [fee-based](#) wealth management firm in Vancouver, we have chosen Nicola for their wide range of financial services and their large, talented team.

Key Factors that Enabled Nicola Wealth Management to Rank as a Top Wealth Management Firm in Vancouver

Unique Investment Opportunities

With Nicola, you have access to investment opportunities otherwise hidden to other investors. This includes the ability to partake in a Nicola wealth management investment pool.

You have the chance, for example, to own investment-grade commercial real estate. Due to innovative thinking and the inroads they've forged within the financial services industry, Nicola can open doors that most Vancouver wealth management firms cannot.

Many private investments preclude a large segment of the investing population due to their selective nature and requisite high minimums. With Nicola, however, you have access to such assets, affording you the potential for greater returns through more numerous, higher-quality investments.

Additional unique opportunities include alternative strategies like commercial mortgages, private equity, private debt, and direct real estate ownership.

Performance and Reporting

The Vancouver financial advisors at Nicola are committed to keeping clients up-to-date on their portfolio's performance and progress while providing education on why investments are behaving the way they do—and what can be done to maximize them.

To that end, Nicola provides clients with:

- **Rate of Return Statements**—Distinguishes between deposits and actual investment returns to provide clients with a clear picture of performance
- **Cash Flow Statements**—Shows exactly how much cash is generated by your portfolio (after fees are deducted)
- **Fiscal Report Statements**—Provides detailed reporting to assist accounting professionals with annual tax filing

Additionally, your Vancouver financial advisor will schedule either a face-to-face meeting or a phone call at least once every quarter, and work with a network of advisors and consultants to ensure that your financial plan is both synergized and maximized.

Rating Summary

As one of the top financial advisors in Vancouver, BC, Nicola Wealth Management provides clients with an expert, diversified approach to comprehensive wealth management.

All financial plans and portfolios are highly customizable and built to address a variety of financial challenges at once, making Nicola Wealth Management one of the best investment firms in Vancouver to consider partnering with this year.

Odlum Brown Limited Review

Founded in 1923, [Odlum Brown Limited](#) (ODL) is an independent financial advisor in Vancouver offering financial planning and investment services.

We could not verify whether ODL uses a fee-only or a fee-based structure. As always, we recommend verifying compensation before partnering with a financial advisor in Vancouver.

Key Factors that Enabled Odlum Brown Limited to Rank as a Top Financial Advisor in Vancouver

Service Personalized to You

Whether you need a financial plan or investment management, ODL initiates the client-advisor relationship by getting to know your financial goals and needs, both in the short-term and the long-term.

Your Vancouver financial advisor will not proceed with your financial plan until you're comfortable with each step outlined within the following core concerns:

- Retirement planning
- Estate planning
- Tax information services
- Insurance and annuities

No matter what the change entails, your advisor is flexible and willing to help you adapt. In this way, your plan and the investment strategies worked out with your ODL advisor remain open to the complexities of life.

Rather than getting off-track and staying off-track, this guarantees that you will be able to evolve on the fly and still see your financial dreams become a reality.

Research Oriented

Odlum Brown is one of the largest Vancouver financial advisors on this ranking, and they have resources that a smaller financial advisor in Vancouver might not be able to deliver.

For example, Odlum Brown has a research department with expert analysts who take the approach of business owners as they research and recommend equities.

Investment research from this leading financial advisor in Vancouver is based on sourcing top-quality companies with sustainable advantages, conservative leverage, and excellent management.

Essentially, the research provided by Odlum Brown, one of the top financial advisors in Vancouver, helps them recommend clients to companies that they'd like to own themselves, ensuring that advice is both genuine and fact-based.

Rating Summary

As one of the largest Vancouver financial advisors on our list, Odlum Brown Limited also boasts one of the largest, most experienced staff, bringing an array of industry credentials and experience.

With comprehensive financial planning, a wide range of investment products, and an in-house research team, Odlum Brown Limited is one of the best financial advisors in Vancouver, BC.

Popular Article: Best Financial Advisors in Charlotte, North Carolina

Pacific Spirit Investment Management, Inc. Review

Founded in 1994, [Pacific Spirit Investment Management, Inc.](#) is an independent Vancouver financial advisor that offers personalized portfolio management and comprehensive financial planning.

As a [fee-only](#) firm, Pacific Spirit provides clients with financial advice that is never motivated by commissions or company brands, ensuring an unbiased, client-centric approach.

Key Factors that Enabled Pacific Spirit Investment Management, Inc. to Rank as One of the Best Vancouver Wealth Management Firms

Integrated Financial Planning

Rather than focus on one area of financial planning at a time, Pacific Spirit strives to provide comprehensive, integrated financial planning services across four broad categories. These include:

- **Retirement Planning**—Considers inflation, returns, retirement date, government benefits, and your desired retirement lifestyle
- **Estate Planning**—As a part of the financial planning process, estate planning maximizes the value of your estate and minimizes taxes
- **Registered Pension Plans**—Tax-efficient ways for business owners and executives to plan for retirement
- **Insurance Advice**—While your Vancouver financial advisor will not sell you insurance, they will gladly review your current coverage and help you find the right products for your needs

Highly Talented Team

The team of financial advisors at Pacific Spirit boast a wide range of professional certifications, demonstrating a strong commitment to industry knowledge.

With an average of over 20 years' experience, this team of Vancouver financial advisors holds the following designations:

- CPA—Chartered Professional Accountant
- CFP®—Certified Financial Planner
- CFA—Chartered Financial Analyst
- CA—Chartered Accountant
- CIM—Canadian Investment Manager
- CGA—Certified General Accountant

Many of these designations come with strict requirements for fiduciary duties and ongoing requirements, ensuring that clients receive advice that is truly up-to-date and in their best interest.



Business Owner (Mr. J)
"I Want a New Porsche Every Year"



Professionals (Mr. & Mrs. D)
"We Trust Your Advice"



Executive (Ms. D)
"I Want to Achieve My Financial Dreams"



Business Owner (Ms. R)
"I Wish to Retire Worry Free"



Retired (Mr. & Mrs. K)
"We Don't Want to Eat Dog Food"



Entrepreneurs (Mr. & Mrs. P)
"We Want to Keep Ahead of Inflation?"

Pacific Spirit Investment Management

Rating Summary

As a fee-only financial planner in Vancouver, Pacific Spirit Investment Management provides clients with transparency and trust, creating a strong foundation for long-term financial planning relationships.

With a talented, experienced team and a client-centric structure, Pacific Spirit Investment Management is one of the best financial advisors in Vancouver, BC to consider partnering with this year.

RGF Integrated Wealth Management Review

Founded in 1973, [RGF Integrated Wealth Management](#) is a financial advisor in Vancouver that has since expanded to over 60 employees.

Although we were unable to verify whether RGF is a fee-only or fee-based firm, they do state that they “offer independent non-biased advice.” As always, we recommend verifying compensation structure before partnering with any financial advisor in Vancouver, BC.

Key Factors that Enabled RGF Integrated Wealth Management to Rank as a Top Financial Advisor in Vancouver

Experienced & Certified Professionals

When a financial advisor in Vancouver features a team of designated professionals, it represents a strong commitment to ongoing education and knowledge of recent developments within the financial industry.

The wide range of designations achieved by members of the RGF advisory team includes:

- Registered Financial Planner (RFP)
- Certified Financial Planner (CFP®)
- Chartered Financial Consultant (CHFC)
- Certified Life Underwriter (CLU)
- Master of Business Administration (MBA)
- Certified Investment Manager (CIM®)
- Fellow of Canadian Securities Institute (FCSI)
- Financial Management Advisor (FMA)
- Certified Professional Consultant on Aging (CPCA)
- Chartered Financial Analyst (CFA)
- Registered Health Underwriter (RHU)
- Chartered Financial Divorce Specialist (CFDS)

In addition to the above certifications, Vancouver financial advisors at RGF average 15 years of financial planning and portfolio management experience, instilling trust that the firm has both the expertise and experience to handle a variety of financial challenges.

Comprehensive Suite of Services

As a top financial advisor in Vancouver, RGF provides clients with an impressive suite of financial solutions, broken down into five categories:

- **Family & Lifestyle**—Helping Dependents, Assisting Parents, Buying a Home, Travel & Leisure
- **Optimizing Your Finances**—Minimizing Taxes, Generating Income, Managing Cash Flow & Debt, Business Owners

- **Planning for the Future**—Creating a Plan, Saving for Your Goals, Preparing for Retirement, Protecting Your Health
- **Navigating Change**—Changing Career, Retirement Transition, Life Changes, Starting a Business
- **Transferring Wealth**—Estate Planning, Estate Transfer Planning, Charitable Giving

This provides clients with a complete overview of what to expect from their Vancouver financial advisor before they even walk in the door, making it easy to evaluate the full breadth of RGF’s capabilities.



RGF Integrated Wealth Management - Vancouver, BC

Rating Summary

As an independent financial advisor in Vancouver, RGF Integrated Wealth Management is not represented by or affiliated with a bank, trust company, insurance company, or investment firm.

Instead, RGF is wholly owned by their financial advisors, providing the autonomy necessary for unbiased advice and excellent customer service.

With a highly certified team and an impressive range of financial capabilities, RGF Integrated Wealth Management is one of the best financial advisors in Vancouver to consider partnering with this year.

Read More: Best Financial Advisors in Philadelphia, PA

T.E. Wealth Review

Founded in 1972, [T.E. Wealth](#) is a financial advisor in Vancouver that provides comprehensive investment management and financial planning for individuals, employers, and aboriginal clients.

We could not concretely verify whether T.E. Wealth uses a fee-based or fee-only structure, though the firm is [likely fee-only](#). As always, we recommend verifying compensation before partnering with any financial advisor in Vancouver, BC.

Key Factors that Enabled T.E. Wealth to Rank as a Top Financial Advisor in Vancouver, BC

Aboriginal Services

Tribal communities across Canada are experiencing a surge in revenue-generating opportunities. With these opportunities comes the need to manage the attendant wealth and invest it for the future, which is where a top financial advisor in Vancouver comes in.

The Aboriginal Services division of T.E. Wealth focuses on providing tribal communities with the same high-level financial planning and portfolio management tailored to their unique needs, offering services like:

- Setting a vision and establishing community priorities
- Managing change through communication and consultation
- Guidance in Trust development

- Developing investment policies and guidelines
- Assistance in developing cost-effective portfolios
- Investment manager search and selection
- Performance monitoring, measurement, and interpretation

With a dedicated team, tribal communities reap the benefit of receiving advisement from advisors that have the specific training and expertise to address the unique financial challenges faced by their community.

Comprehensive Services for Individuals

As a top financial planner in Vancouver, T.E. Wealth provides total wealth management for individual clients, encompassing both financial planning and investment management divisions. Their wide range of capabilities include:

- Financial Planning
- Investment Management
- Career Transition Financial Analysis and Planning
- Tax Planning and Preparation
- Insurance and Annuity Reviews
- Inheritance and Estate Planning
- Charitable Giving and Philanthropy
- Financial Analysis and Divorce Planning
- Retirement Planning
- Managing Financial Windfalls

Rating Summary

As one of the top financial planners in Vancouver, T.E. Wealth provides individuals, employers, and aboriginal communities with a wide range of expert financial services.

Their focus on providing individualized, comprehensive service increases their value, solidifying their ranking as a top Vancouver financial advisor.

Related: Top Financial Advisors and Best Wealth Managers in the US & UK | Top Ranking Lists

Conclusion – Best Financial Advisors in Vancouver, BC, Canada

As you can see, we prefer to recommend Vancouver financial advisors and Vancouver wealth management firms that value the same things that we do: transparency, a client-centric approach, and a long-term focus on your success.

It would be hard to go wrong with any of these advisors in Vancouver. But we acknowledge that not every firm, no matter how rigorous our research and methodology may be, is going to be right for you.

This means a little bit of research on your part. Which Vancouver financial advisor meshes with your worldview? Which financial planner in Vancouver offers the services, investment opportunities, and type of relationship that you are looking for in a firm that's going to handle your money and your future?

After all, you have specific needs, goals, and dreams for your money and your future. Just as you are not a one-size-fits-all type of client, neither are these advisors a one-size-fits-all solution.

Rate Table Disclaimer

Click here to read AdvisoryHQ's [disclaimer on the rate table\(s\) displayed](#) on this page.

Image sources:

- <https://pixabay.com/en/vancouver-false-creek-city-panorama-2393812/>
- <http://www.macdonaldshymko.com/our-firm/our-team/>
- <https://moneycoachscanada.ca/7-stages-financial-well-being/>
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