



FAMILY-STYLE FINANCE

Introducing Stewart Fisher Financial

*By Jesse Ziter
Photos by Syx Langemann*

Genuine wealth is inherently complex, and preserving, managing, and growing it demands thoughtful, well-rounded strategies to protect against taxes and other risks. Achieving this requires expert guidance and a collaborative approach to ensure every detail is thoughtfully addressed.

“The financial services sector is so complex now,” says Stewart Fisher Financial CEO and President Richard Paliani. “Whether a client’s priority is crafting tax-efficient strategies, managing investments, or planning an estate, meeting their needs appropriately requires a degree of comprehensive expertise, professionalism, and care you can only get through collaborating with specialized advisors.”



Hailing from Leamington, Paliani brings nearly four decades of distinguished experience in the financial services industry. Renowned for his expertise in tax deferral strategies, life insurance solutions, and retirement planning, he has earned a trusted reputation for guiding clients toward their financial goals. His depth of knowledge and dedication have positioned him to successfully manage one of the region’s most prominent client portfolios, ensuring a lasting impact on the financial well-being of those he serves.

Stewart Fisher Financial represents the merger of Paliani’s previous company with Windsor’s Soulliere Financial and Kitchener-Waterloo’s EastCap Wealth Planning. The result promises to be a financial services juggernaut—an independent firm comprising certified financial planners, investment representatives, group specialists, pension experts, and a full-fledged fixed income department servicing clients throughout Windsor-Essex and elsewhere in Ontario.

“We assess the whole client need by functioning as a team that shares resources, experiences, and knowledge,” Paliani explains. “Basically, we’ve opened a family-style office, which means we have experts in all relevant fields. We’ve assembled a team of specialists and are creating a concierge service to connect our clients with the appropriate people. Together, we match financial strategies and products to meet those needs and accomplish those objectives. The result is a professional, customized planning approach whereby every aspect of a client’s financial life is considered.”

To this end, Stewart Fisher Financial employs industry leaders in group insurance, financial planning, and pensions. Soon, its suite of services will even include a sports and entertainment division. Paliani is also anticipating a partnership with a leading discretionary portfolio manager to oversee the firm’s investment counsel division, focusing on individual stocks and private investment strategies. This collaboration will further enhance the firm’s ability to deliver sophisticated and tailored investment solutions to its clients.

“With the recent CRA changes to capital gains increase and the penalty of passive

income,” Paliani insists, “there has never been a better time for your independent, personal, and trusted accountants and lawyers to work together with one of our specialists to ensure everyone is on the same page.”

The forward-looking firm has set up shop in a stunning new Wyandotte Street office space, on the upper level of the former Twisted Apron building, overlooking Windsor’s booming Walkerville neighbourhood. In addition to an already-operational Kitchener-Waterloo location, satellite offices in Oakville and Toronto’s Bay Street financial district are currently being readied.

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Larry Hoekstra, who will primarily work out of the Kitchener-Waterloo branch, is the founder of EastCap Wealth Planning. He specializes in family markets, segregated funds, and estate planning. Nick Giovannetti, the firm’s other managing partner, is a London-based certified financial planner and chartered life underwriter who most keenly focuses on individual pension plans, retirement compensation arrangements and advanced planning.

Giovannetti first connected with Paliani on a consultancy basis as a subject matter expert. EastCap enjoyed a productive professional relationship with Paliani for the better part of a year before deciding to join forces.

“Both Larry and I have always given advice based on a planning-first approach,” says Giovannetti. “Like the way Richard runs his practice, we are independent and

unbiased in the solutions we bring forward. We work quite well together because we both believed in the same core values. The only way to truly operate according to a product-agnostic, unbiased approach is to continue to merge and grow, as we’re doing.”

“It’s getting tougher and tougher in the financial services industry, and we want to be able to reach more people and offer more services,” adds Hoekstra, who has worked in financial planning for 26 years. “Collectively, we have a good mix of clients across income brackets. All the departments excel in certain specified areas, and we are very confident in our specialists. We think it’s a good blend.”

While EastCap was a regional financial stronghold, the Stewart Fisher merger enables it to significantly expand its influence. “Just as the world is becoming more globalized, that’s what the firm is trying to do,” promises Giovannetti. “We’re making sure we’re licensed in provinces across Canada—currently BC, Alberta, and Nova Scotia—and have the technology and ability to serve clients coast to coast.”

Part of the firm’s growth is a complete corporate rebrand. The Kitchener-Waterloo office formerly known as EastCap Wealth Planning is now the second brick-and-mortar Stewart Fisher Financial location. Soon, with the launch of Oakville and Bay Street offices, four locations will operate under the Stewart Fisher Financial brand.



Pat Soulliere is one of the best recognized and most trusted names in Windsor-Essex finance. As head of client relationships for Stewart Fisher Financial, she oversees identifying and onboarding her new clients. In her own words, Soulliere, “assists business owners and professionals in maximizing their wealth while minimizing their taxes so as to affect future generations in a positive way.”

For Soulliere, Stewart Fisher represents the culmination of a long-term professional interest in corporate cooperation and multidisciplinary partnerships. After more than four decades of prominence in the sector, Soulliere had no shortage of suitors. “I’m excited about the merger,” she relates. “I turned down a number of people before finding somebody likeminded and forward-thinking. Richard and I started speaking and we both seemed to sing from the same song sheet. We have the same mindset, approach to business, and professional objectives.”

Moreover, Stewart Fisher’s “family-style” firm minimizes Soulliere’s reliance on outside institutions and their vested interests. “In the past, across our business, we were all out there as individuals trying to be all things to all people,” she explains. “To me, it was very confusing for the population. We needed to grow our area of expertise and surround ourselves with other people who are amazing talents in their own specific

fields. I'm really proud to be working with the group as I think we can do a much better job and secure the best outcomes for our clients this way.

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At Stewart Fisher, Soulliere will continue to work with Elise Keller, a successful financial advisor of wealth and tax strategies for small to medium sized business owners and incorporated professionals. She also happens to be her granddaughter.

"I am so proud to be working side-by-side with her," shares Soulliere. "She's been with me now for over ten years, and I continue to watch her take this business very seriously. Her clients rave about her. She's very forward thinking, and she has this unique ability to break down any complications clients feel about their financial planning and bring them peace of mind."

"I'm lucky enough to have somebody who is my grandmother who is also my mentor who is also one of my best friends," says Keller. "In this profession, people are often focused on finding the nuts and bolts, but she's taught me over the years to get to know the people behind the business. Now, at Stewart Fisher, we have a heightened capacity to take on more business clients. Having this team in place, I'm able to do more."

Soulliere's existing clients will be heartened to learn she has no plans to retire any time soon. "My legacy is my growing family and making a better world for whatever I do," she stresses. "I spend a lot of time with my family, and I seem to have a lot of time for the business. I absolutely love what I do, always feeling younger through the work."

The Stewart Fisher Financial team includes several further professionals:

Phillip Danelon, a financial advisor, holds an MBA and boasts several years of financial industry experience. He works closely with Paliani to provide the best possible client advice.

Mark Giovannetti, the firm's concierge, has over 30 years of experience in the



banking industry. He ensures corporate clients see their banking needs met.

Jack Larmond, owner of JWL Benefits, will operate as Stewart Fisher Financial's group specialist.

The entire Stewart Fisher Financial professional roster is supported by a hardworking administrative unit. "Our firm would not be complete without the assistance of our amazing client services and management team," says Paliani. "Our support staff are all very qualified, extremely professional, and outstanding employees."

Operations Manager Dina Maglic, who holds a degree in Psychology from the University of Windsor, has worked with Paliani for 18 years. She has contributed significantly to his continued success and financial growth.

Client Services Specialist Morgan Eagen is a University of Windsor Communications graduate. "Her dedication to the team and

willingness to go beyond for our clients, has gained her the current role of Assistant Manager," says Paliani.

Corrine Manning boasts 8 years of financial services experience as well as a 15-year teaching career. She holds an Honours Bachelor of Commerce from the University of Windsor.

Carli Paliani, Richard's daughter, is the newest team member at Stewart Fisher's Walkerville location. She has a degree in Business Administration from the University of Windsor.

The firm's Windsor administrators are proud to collaborate with Stewart Fisher's new Kitchener-Waterloo staff: Client Service Specialist (business development & operations management) Kathy Pettit, Office Manager and Executive Assistant Jennifer Koebel, Executive Assistant Tiffany Dietrich, and Associate Financial Advisor and Investment Representative Cindi Atkinson.

Outside the office, Richard credits much of his success to the unwavering support of his wife, Dawn, and their two adult children: Carli and Devon, who plans to join the firm soon.

No matter your unique financial needs, there's always a seat at the Stewart Fisher Financial table. With a welcoming and dedicated team, the firm is committed to guiding your financial journey by aligning you with the right experts for your situation. Backed by over half a billion dollars in investment and insurance assets under management, Stewart Fisher Financial is well-positioned to provide clear, tailored insights into even the most complex financial matters, ensuring you're supported every step of the way.

Stewart Fisher Financial is located at 203-1801 Wyandotte Street East (at Chilver Road) in Windsor. You can reach Richard Paliani at 226-216-0895 or rpaliani@stewartfisher.ca.

