



Jim Lao has brought together a team of specialists to ensure his clients receive efficient, expert and friendly financial planning advice and servicing.

Jim Lao

Financial Advisor

As your Financial Advisor, Jim will coordinate the financial planning process for you. Jim will help you to identify your goals and he will work with you to implement a series of strategies that will help you to realize your vision for the future.

Ryan Genoe

Associate Financial Advisor

As an associate financial advisor, Ryan may assist Jim in preparing your plan along with providing financial advice on certain areas of your financial model.

Carol Lao

Administrative Assistant

Carol ensures that our clients receive the best possible service. She will book appointments for you and is the first person you should call if you have any questions about your financial planning process. She will ensure that the appropriate member of our team responds to your query.

Monique Raposo

Client Service Manager

Monique ensures that our clients receive the best possible service. She is the liaison between our clients and the Financial Services Companies we work with. She assists with the client onboarding and client service requests.

Our Other Professional Resources

Because your financial situation is often complex, Jim typically works directly with other professionals to design and implement the strategies that will help you to achieve your goals. He relies on a network of professionals who provide technical advice as required.

The professionals Jim works with include:

Estate Lawyer – Sonia Kociper

Certified Public Accountant – David Jamestee

Mortgage Broker – Jonathan Sowerby

Private Wealth Advisor – Lynn Trevisan



President TvH Financial Inc.