At TvH Financial Inc., we offer the resources and flexibility to provide you with personalized wealth building strategies. We do so through a program called L.E.A.P. which is also known as Lifetime Economic Acceleration Program.

Wealth Building is not a static situation but rather it is fluid and dynamic, just like your life. We recognize that as your life unfolds your needs will evolve and we maintain an ongoing process that not only allows us to react to Critical Financial and Life Events but assures that we can actually prepare for them.

We know events can be as diverse as planning for retirement, selling a business, receiving an inheritance, buying a recreational property or pro-actively planning for your legacy. Our resources, experience and expertise take the many pieces of your financial plan and keep them in place so that your path to financial independence is clear.

What is your role at TvH Group?

I work closely with clients to help them set short and long-term goals and then create a financial plan for them. It is a very important process and must reflect the client's goals and aspirations.

Once their goals are set and the plan is in place, I bring in the other experts within TvH Group to help make the plan a reality. I liken myself to a general contractor who has responsibility for a home's construction. I am responsible for identifying and working closely through each phase with the best professionals for the job.

How did you get into the financial advisory and investment business?

I have been in the business for 30 years and went out on my own in 2000 as an insurance specialist and financial advisor. I have never looked back.

At 16, I was the youngest teller in the history of one of the large Canadian banks. I attribute this achievement to my passion for finance and helping people succeed. I have experience in the insurance arena, which enhanced my understanding not only of the value of insurance but of financial planning and the importance of establishing clear life goals.

What do investors seek most in their financial advisor?

They want to first trust their advisor, who must listen well and possess deep knowledge and experience. Many investors seek an educator and objective consultant versus a salesperson who is tied to product and personal sales target to earn their livelihood. I am definitely in the former category.

How do you meet and exceed client expectations?

I preach what I practice. My colleagues and I invest along side our clients and share the same investment and risk management philosophies, which leads to consistent service for our clients.

Before I offer any solution, I ask whether I would recommend it for myself. I do not want to be a salesperson and may consult one of my partners if I sense my solution might position me in this way. I am an advisor, not a trader who is commission driven. Clients work with me because I am consultative and work in collaboration with them.

My non-proprietary, collaborative approach is rare in the financial services industry.

Creating a Better Financial Future for Our Family of Clients

WHAT WE DO

At TvH Financial Inc., we are a full-service retirement and financial advisory firm. We specialize in Retirement, Estate, and Security Planning, as well as, business and family succession strategies. Keeping in place all of the unique pieces of your financial planning puzzle are how we ensure that you achieve your goals and find your Joy and Freedom.

We have refined a proprietary process called L.E.A.P. also referred to as Lifetime Economic Acceleration Program. Our process integrates wealth management with risk and debt management, tax planning and philanthropy. Our objective is to take all the pieces of your financial plan and put them in place. Each plan is unique. Many of those pieces may not be relevant to you or your plan at this time, but as your life unfolds and your needs evolve, TvH Financial Inc. and Lifetime Economic Acceleration Program follow a proven process to ensure your financial independence.

WHO WE ARE

TvH Financial Inc. was born from the desire to find a NEW way to help clients improve and organize their financial lives into an easy to understand interactive format. We are an independent firm that is committed to helping clients solve their complex financial goals.

“At TvH Financial Inc., we recognize that we are not all things to all people, nor do we want or expect to be. We are all things to some people and our client relationships are based on a very specific FIT process, allowing us to partner with those clients we are most suited for. In doing that we are able to provide an elevated client experience keeping all the pieces of each clients individual financial plan in place.”

OUR PARTNERS

A very important feature of the Lifetime Economic Acceleration Program is partnering with like minded CAs, Estate Attorneys, Mortgage Brokers, and Real Estate Professionals. We recognize that for a financial plan to be complete and sustainable it must also address issues around income and distribution strategies and tax planning, risk, and debt management as well as estate and legal concerns. Our partners are a key part of the process and ultimately help our clients reach their full potential around