RAY GLICKSOHN

Primary Role

Helping clients live life to the fullest, achieving an alignment of goals, values and personal finances.

Fast Facts

- Senior Financial Planner
- B. Comm, CFP (1991), ACM Securities License
- Clientele: Incorporated Business Owners and Medical Practitioners
- Values: Environmental, social conscience, children's education
- Partner: Danielson Group Wealth Management

Service Summary

- Integrated wealth planning delivery
- Financial DNA and values assessment
- Straight talk about risks and wealth planning opportunities
- Tax analysis, planning and modeling
- Annual family general meeting (AGM)
- "Personal CFO" approach
- Coordination and implementation of our Wealth 360 process

Financial DNA: Motivator

Motivators usually have a unique blend of confidence, initiative and people skills. They are typically able to see the larger vision and then use their superior communication skills to motivate advisors, family or other investment partners towards accomplishing it.

What are your goals? Do you want to learn more about how the markets work and how financial planning fundamentals fit your personalized strategy?

Ray works with a team of advisors and associates to develop your plan and to help you and your family keep on track through education, regular meetings and reports.

In his experience, emotions often lead to money management mistakes, so his job is to provide discipline, give you "peace of mind", and help you understand and link your priorities and values so you can make wise decisions. "Why" is often even more important than "What!"

He knows something of the importance of discipline, having gone on a month-long expedition to Mount Everest Base Camp! When not trekking in Nepal, he loves a good game of squash, skiing and hiking with his family right here in beautiful BC.