

LISTS: BIGGEST FINANCIAL PLANNING FIRMS IN METRO VANCOUVER IN 2013

Biggest financial planning firms in Metro Vancouver in 2013

RANKED BY | Number of accredited local financial planners

Rank '13	Company	Financial services offered	Compensation type	Headquarters	Year founded locally	No. of accredited financial planners '13/'12
1	Freedom 55 Financial www.freedom55financial.com	Financial planning, benefits consulting and estate planning	Commission-based	London, Ont.	1874	305 290
2	RBC Royal Bank of Canada www.rbcroyalbank.com	Financial planning, investment advice, credit, banking, estate planning, retirement planning and education	Combination	Toronto	1864	283¹ 283
3	CIBC www.cibc.com	Financial planning, comprehensive product offerings including investments and mortgages	Combination	Toronto	1867	180² 180 ²
4	Customplan Financial Advisors Inc www.customplanfinancial.com	Estate and succession planning, financial planning, life insurance	Combination	Vancouver	1976	116 114
5	Investors Group Financial Services www.investorsgroup.com	Wealth management; investment, retirement, estate and tax planning, mortgages, insurance, cash management, estate planning and brokerage services	Commission-based	Winnipeg	1926	108 108
6	TD Wealth Financial Planning http://financialplanners.tdwaterhouse.ca/locator/	Financial planning, retirement planning, spousal education planning, in-trust account investment planning, estate planning and tax planning	Combination	Toronto	2001	108 107 ³
7	Vancouver City Savings Credit Union (Vancity) www.vancity.com	Full-service financial institution serving B.C. residents in day-to-day banking, lending and investment advice and services including business banking, micro-finance, growth capital and commercial real estate	Combination	Vancouver	1946	87 85
8	Assante Wealth Management www.assante.com	Integrated wealth-management solutions, investment strategies, financial planning, risk management and insurance, tax and estate planning, cash and credit management	Combination	Toronto	1995	68¹ 68
9	BMO Financial Group www.bmo.com	Banking products and services including investment and retirement planning, estate planning advice, commercial banking from small and independent businesses to mid-market firms and to large investment banking advice for major firms and governments	Combination	Toronto	1887	62 67
10	ScotiaMcLeod www.scotiamcleod.com	Financial planning, estate planning, retirement planning, educational planning, multigenerational planning, insurance and investment advice	Combination	Toronto	1921	40 38 ³
11	Manulife Securities Inc www.manulife.ca	Mutual funds, brokerage facilities, RRSP, private accounts, insurance, annuities and money products	Combination	Toronto	NP	33⁴ NP
12	Nicola Wealth Management www.nicolawealth.com	Financial planning and investment advice, discretionary portfolio management, specialized tax planning and estate planning	Combination	Vancouver	1994	28 26
13	Coast Capital Savings Credit Union www.coastcapitalsavings.com	Full-service financial institution	Salary	Surrey	2000	28 25
14	North Shore Credit Union www.nscu.com	Full-service financial institution, advice in banking, personal and commercial loans, investments, wealth management products and services, insurance and leasing	Combination	North Vancouver	1941	27 26
15	First West Credit Union www.firstwestcu.ca	Full-service financial institution providing B.C. residents with personal and business banking, insurance services, wealth-management advice and subordinated debt financing	Combination	Langley	1946	20¹ 20
16	Prospera Credit Union www.prospera.ca	Banking and wealth-management services	Combination	Abbotsford	1942	19 22
17	Rogers Group Financial www.rogersgroup.com	Comprehensive financial, estate and investment planning. Discretionary portfolio-management services also offered.	Combination	Vancouver	1973	18 18
18	Macdonald, Shymko & Company Ltd Fee-Only Financial Planners & Portfolio Manager www.macdonaldshymko.com	Since 1972, we have provided comprehensive and unbiased "fee only" financial planning, portfolio management, tax, retirement, estate and executive stock option planning	Fee-based	Vancouver	1972	15¹ 15
19	ZLC Financial Group⁵ www.zlc.net	Insurance and retirement planning, employee benefits, structured settlements and private investment management	Combination	Vancouver	1980	14 14
20	National Bank of Canada www.nbc.ca	Financial services	Fee-based	Montreal	1859 ⁶	10¹ 10
21	Vancouver Financial Planning Consultants www.vfpc.ca	Financial planning and wealth-management services	Combination	Vancouver	1985	9 9
22	Covenant Family Wealth Advisors www.covenant.ca	Family wealth advisors; financial, estate and tax planning, succession planning	Combination	Langley	2000	9 8