

Brian E. Jackson



CFP

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My Philosophy/Biography

Brian primarily spends his time working on the client service duties of his role as a Certified Financial Planner. He focuses on maintaining IPG's high level of customer service and in achieving clients' financial plans. Socially Responsible Investing is a personal and business interest Brian promotes in the community.

Brian's workdays are comprised of maintaining regular communication with clients, prospects and liaising with staff or suppliers about client accounts. He devotes a portion of his time discussing financial planning issues with other members of The Advisory Group. Brian has more than 30 years of successful experience in the financial industry, working for companies including the Bank of Montreal, Canada Trust and Investors Group Inc. Over his career, he has held positions including Bank Branch Administrator, Internal Auditor, Pension Trust Officer and Financial Planner.

Areas of focus

- Socially Responsible Investing
- Retirement Income Planning
- Capital Protection Planning
- Guaranteed Income for Life
- Insurance Planning
- Tax Reduction Tactics
- Charitable Giving Planning
- Estate Planning
- Personal Financial Planning