OUR TRUSTED ASSOCIATES

HERE AT SECUREPLAN, WE STRIVE TO MAKE SURE THOSE AROUND US ARE PROPERLY TAKEN CARE OF IN ASPECTS OF FINANCIAL WELL BEING. THIS PHILOSOPHY HAS HELPED US BUILD VERY STRONG RELATIONSHIPS WITH OUR CLIENTS AND BECOME A TRUSTED PARTNER WHEN IT COMES TO MAKING IMPORTANT FINANCIAL DECISIONS.

BUSINESS IS ALL ABOUT RELATIONSHIPS, AND EVEN IF YOU MAY NO LONGER HAVE ANY INSURANCE NEEDS YOURSELF – I WANT TO LET YOU KNOW THAT I AM ALWAYS HERE TO HELP YOU AND YOUR FAMILY IN ANY WAY I CAN.

HERE ARE A FEW OF THE COMPANIES THAT I TRUST WILL PROVIDE THE SAME LEVEL OF SERVICE IN WHICH I PROVIDE TO YOU.

IT'S IMPORTANT TO KNOW THAT WE DO NOT RECEIVE ANY REFERRAL FEE'S OR COMMISSIONS FROM OUR TRUSTED ASSOCIATES.   WE SIMPLY WANT TO HELP MAKE SURE YOU OBTAIN THE SERVICE AND ADVICE YOU DESERVE.

Jeff Romansky | Principle | CHS, CPCA
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SECUREPLAN
INSURANCE SOLUTIONS

BOOK KEEPING

Jacqui Dusil is the owner of “The Bookie”, a Profit First bookkeeping company. She serves entrepreneurs and small business owners to grow their businesses profitably.

As an entrepreneur herself, who has worked in many areas of finance, Jacqui is able to see the whole picture and understand the challenges that new business owners face.

What makes The Bookie different is that they are an accredited licensee of the Pure Bookkeeping System. They are certified in the Profit First method, have direct hands-on experience increasing the profits for multiple businesses, and have access to profit specialists throughout the globe. This means that they have the strategies to drive profitability in your business and make it more successful than ever before.

JACQUI DUSIL
the Bookie
SMALL BUSINESS BOOKKEEPING

JAQUI DUSIL

The Bookie, Book Keeping

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FINANCIAL PLANNER

There is no such thing as a “standard” retirement or financial plan. In a country like Canada, where financial planning is an unregulated profession, quality and price can vary greatly amongst unregulated financial planners.

However, all planners with Objective Financial Partners are Certified Financial Planners (CFPs) and have extensive experience. By using state of the art financial planning tools and software, Objective Financial Partners provides thorough, in-depth, objective financial planning.

They do not sell investments or insurance, do not receive referral fees or commissions, and are paid exclusively by their clients. There are very few financial planners in Canada who operate like they do, and you can expect only the best from Objective Financial Partners.

OBJECTIVE
FINANCIAL PARTNERS INC.

OBJECTIVE FINANCIAL PARTNERS INC.

Brenda has over 20 years of experience in the financial services industry with a particular emphasis over the past 10 years on retirement planning, business owners and expatriate Canadians. She has also worked as a bank branch manager, a financial advisor trainer and a college professor, teaching students about investment products. Whether she's explaining a financial concept to one person or to a room of 100, Brenda's approach to personal finance is that of education. After all, it's much easier to follow advice when you understand it.

BRENDA HISCOCK, CFP, RHU

Objective Financial Partners

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Brenda has a particular interest in working with clients and their advisors and in financial education for employees but works with people from all walks of life.

She is a Certified Financial Planner (CFP) and also holds a Registered Health Underwriter (RHU) designation with specialized knowledge in living benefits such as disability, critical illness and long-term care insurance.

Nancy had a 20-year career as an investment and insurance advisor with two large wealth management firms, working as a Senior Associate focused on building and presenting client financial plans and investment portfolio reviews.

Nancy is a Certified Financial Planner (CFP). She has a particular interest in financial planning for seniors and their adult children but works with single people, seniors and families at all planning stages seeking to take control of their financial lives.

NANCY GROUNI

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HUMAN RESOURCES

Through our strategic partnership with BBCi Performance Management Group, we can help you obtain expert HR advice and support. With services offered on a project, retainer, or on a contract basis, BBCi will help you recruit, direct, manage and motivate your workforce. They help companies maximize their human resource potential, allowing business leaders and managers to focus on other critical elements of the organization.

With BBCi, you save the time and money while ensuring that your HR needs are managed effectively and professionally. BBCi gives you the HR support you need, when you need it.

BBCi
HR SOLUTIONS THAT WORK

BBCI

TERRY CONLEY
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Lindsey works with organizations to identify the true costs of Human Capital Management and develop the best operational strategy around the pillars of HCM – Human Resources, Payroll, Benefits Administration, Time & Attendance and Talent Management.

The first step in her process is to meet with you and gain an understanding or your business, followed by a full analysis and ROI to see where savings can be achieved.

Her primary goal is to reduce cost centers by utilizing HCM strategies to eliminate inefficiencies and provide insight for organizations to make strategic decisions around their biggest asset: their people.

Through building a sound and compliant HR infrastructure, business owners are able to reduce costs, mitigating risk and have visibility into their workforce.

LINDSEY BOKOR
Business Development Manager, ADP
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LAWYER

Adam advises clients from a broad spectrum of industries, and they benefit from his strategic thinking, clear communication and unrelenting pursuit of the best possible result. Drawing from experience from business law, Adam understands the needs of his clients and develops the necessary solutions to deal with complex employment matters.

He places an emphasis on servicing his clients concerns to alleviate any undue stress. When an issue arises, he addresses it by conducting a thorough, detailed review of the matter, consulting with the needs of the client, and developing the best strategy to advocate for the client's rights.

In addition to his work for employers, Adam is noted for advancing the claims of employees in wrongful dismissal and human rights matters, as well as acting as an independent party conducting audits of the workplace, investigations for workplace violence and harassment, and workplace training.

ADAM SAVAGLIO

Scarfone Hawkins Law, Partner
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Growing up in the Niagara Region, Yar has built strong ties to his community and possesses a passion for the people and the region where he calls home. Rooted in the Ukrainian community, Yar is fluent in the Ukrainian language.

Since his call in June of 2010, Yar's has been focusing his practice on matters of family law, civil litigation, wills and estate matters.

Yar's successful negotiation skills, practical approach to resolving issues, and commitment to his clients is apparent in his ability to interact, understand and deliver results.

YAROSLAV O. DIDUCH

Lancaster, Brooks & Welch LLP - Partner

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Sarah joined Haber & Associates in 2010 as an associate lawyer. She holds a BA in Psychology (Hons) with a minor in Sociology from McMaster University and achieved her Juris Doctor (cum laude) from Thomas M. Cooley Law School in the United States of America.

Sarah has been admitted to practice law in Michigan (2008), Ontario (2010) and Florida (2012) and currently maintains her membership with The Law Society Of Ontario only.

Sarah practices personal injury law representing victims of motor vehicle accidents, slip and falls and medical malpractices. She engages in a client-focused practice and strives to achieve the best results for her clients.

SARAH MARSHALL

Harber & Associates, Personal Injury Law

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REAL ESTATE INVESTMENT

Sandy is an experienced investor and realtor with Keller Williams Complete Realty in Hamilton, Ontario, Canada.

Sandy has worked on hundreds of real estate transactions since 2011 both as a realtor and investor.

Sandy's main focus is providing a world class real estate experience of buying or selling property for his clients.

Sandy MacKay and his team Mackay Realty Network stay on top of the cutting edge of real estate innovations.

SANDY MACKAY

Mackay Realty Network

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With over 10 years of international Real Estate experience as a Broker, owner and trusted advisor, Chris has a Real Estate background that has garnered him the title of an Expert Real Estate Advisor across all facets of the industry. And his clients truly value his unbiased opinions and willingness to put their needs first with a focus on helping them make the best decision possible based on their individual needs.

“Helping others is my passion, and guiding people through one of their largest decisions – whether selling or buying their home – is an honour and a privilege. I love what I do.”

CHRIS KNIGHTON

Knighton Real Estate Advisors

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ACCOUNTANT

KPMG has the resources required to provide a full range of services to clients situated in Hamilton and Niagara, while offering the strength of their national and international member firms.

KPMG recognizes that personalized service at the local level is essential for their clients, and that earning your business and trust comes down to superior service and delivering value. They strive for the highest professional standards and are committed to producing leading results for you.

At KPMG, they work closely with their clients, helping them to mitigate risks and grasp opportunities.

DAWN LAGESTEN

KPMG Enterprise

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Mike Veldhuizen, CPA, CA, is a Partner and Business Advisor with MNP's Tax Services team. Working out of the St. Catharines office, Mike delivers tax and business advice and solutions to a broad spectrum of business owners, helping them achieve their business and personal goals.

Drawing on more than 15 years of experience, Mike focuses on delivering highly effective tax strategies for private companies. His willingness to proactively bring ideas forward for consideration allows clients to make strong business and personal decisions that positively impact their financial situations.

Mike gets to know clients, so he can create new opportunities for their operations. His clients include professionals, such as doctors, dentists and lawyers, as well as businesses in agriculture, real estate, hospitality and manufacturing.

MIKE VELDHUIZEN

MNP, Partner, Tax Services

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MORTGAGE BROKER

At Mortgage Intelligence, they know better than anyone that your mortgage is a big decision and a powerful financial tool. They believe that every customer deserves the best care and service when purchasing or refinancing the home of their dreams and are there to serve your mortgage needs.

They can place all types of mortgages including purchases, refinances, equity takeouts, debt consolidations, renewals and mortgages for self employed.

Their business is built primarily though referrals from satisfied customers, so your positive mortgage is essential!

They look forward to helping you achieve your financial and homeownership goals- it's never a bad idea to call them for a free quote and overview of current market conditions.

STEVE DAINARD

Mortgage Intelligence
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Mark has been actively engaged in the real estate industry since 2005. After being involved in numerous transactions as an investor, he realized his passion for the financing side of real estate.

His engineering background, strong analytical skills and knack with numbers allows him to fully grasp the complexity of the mortgage and finance industry. Mark has vowed to help others see this industry with clarity and simplicity by guiding others in obtaining a mortgage product that suits their needs and saves them money.

As a real estate investor, Mark understands the importance of having at your fingertips an expert that you can trust, providing you with elite service. Mark wants to be that trusted mortgage professional serving you!

MARK KUPINA

Mortgage Intelligence

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At Mortgage Alliance, their main objective is to deliver value to the mortgage consumer, and make sure that you get the right mortgage.

They take the time to understand your situation and your needs and use their expertise and knowledge to help you make the right mortgage decision. There are hundreds of different mortgage products out there - and the choices you make could save you thousands of dollars and take years off your mortgage.

Mortgage Alliance works with over 60 lenders from major banks to private sources and compares them all from one place to get the right mortgage for your needs.

At Mortgage Alliance, you work with an independent professional dedicated to your case. When you use the Right Broker, you get the Right Mortgage.

CONNIE MATERNO

Mortgage Alliance

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HOME AND AUTO INSURANCE

Erion Insurance Group is the product of two local brokerages joining forces – Fort Erie's Glenny Insurance (in business since 1927) and Grimsby's P. Tomlinson Insurance (established in 1979).

This merger allows Erion Insurance to provide coverage to the entire Niagara region and beyond.

What sets Erion insurance apart from others on the market, is that it's an insurance brokerage – making them independent and local.

Their job is to represent your best interests by matching you with coverage that best suits your needs and budget from their selection of insurance providers.

Scott Maskell, the president of Erion Insurance Group, has been working in the insurance industry since 2000. His passion for the career started from an early age; with both his father and grandfather working in insurance.

SCOTT MASKELL

Erion Insurance

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905.871.0700

OUR TRUSTED PARTNERS

WE BELIEVE IN SPECIALIZATION AND WANT TO ENSURE THAT YOU ALWAYS OBTAIN THE ADVICE YOU DESERVE. FOR THIS REASON, WE HAVE DECIDED THAT WE WILL NOT BE A ONE-STOP SHOP AND WE HAVE STRATEGIC PARTNERS IN PLACE TO ASSIST IN AREA'S THAT WE DO NOT SPECIALIZE IN.

WHEN DEALING WITH SECUREPLAN, WE MAY RECOMMEND THAT WE BRING IN A PARTNER TO HELP TAKE CARE OF YOU. WE WILL NEVER SHARE ANY OF YOUR INFORMATION WITH THESE PARTNERS UNTIL AFTER YOU HAVE GIVEN US PERMISSION TO DO SO. SECUREPLAN WILL RECEIVE COMPENSATION AND WILL STILL BE YOUR MAIN POINT OF CONTACT WHEN DEALING WITH ANY OF OUR TRUSTED PARTNERS.

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SECUREPLAN INSURANCE SOLUTIONS

GROUP CONSULTANT: SMART CHOICE BENEFITS

Having a benefits program could be the difference between a job candidate accepting the position or not and will help you attract and retain top talent to your organization. With a good benefits plan initiated, medical treatment becomes more accessible- boosting employee health, satisfaction and productivity, while reducing the amount of sick days.

SMART CHOICE BENEFITS

SecurePlan has partnered with SmartChoice Benefits to ensure that we can provide the highest level of customer service to our clients. SmartChoice brings simplicity, affordability and flexibility to benefits administration. This provides you with the freedom to choose best in class benefits from multiple carriers to not only boost employee satisfaction but show them you care for their health and wellbeing.

HEALTH SPENDING ACCOUNTS: MYHSA

Health Spending Accounts (HSA's) are becoming a popular component to group health and dental plans. They can also be an alternative to a conventional plan. An HSA is a flexible and cost-effective solution to meet the changing needs of employers and employees alike. It is an easy way for employers to offer choice and self-service to their employees.

MYHSA

SecurePlan has partnered with myHSA to offer Health Spending Accounts, Taxable Wellness and Employer Funded Charitable donations to our clients.

INVESTMENT ADVISOR

Justwealth is a fantastic company that can provide you with a professionally managed, low-fee ETF portfolio. They are one of the most sophisticated and comprehensive online platforms in the market, with a fantastic team who have managed tens of billions of dollars for large financial institutions on behalf of Canadian investors.

Their advisory board is equally impressive as it includes the President and CEO of Kellogg Canada Inc and the CEO and Founder of Flight Network.

What makes Justwealth unique compared to other online platforms is that they have actual portfolio managers you can talk to- a feature that allows you to understand not only how your money is being invested but give you an insight on the market. They have more than 60 different portfolios to work with, making them more suitable for a larger amount of investor types. In addition to all this, all their accounts are monitored daily- ensuring that your investments decisions are guarded closely and in good hands.

JUSTWEALTH