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Richard is an accredited financial practitioner with over 27 years' experience in banking, private banking and financial planning. He has helped wealthy Canadian families achieve and maintain their vision of financial security, by providing them with comprehensive financial planning services since 2006.

In 1996 he achieved the Canadian Investment Manager (CIM) designation, followed by the Certified Financial Planner (CFP) designation in 1998; and, in 2007, he was awarded the Chartered Financial Analyst Charter.

Always eager to share his knowledge, he has contributed to numerous internal articles and delivered workshops to facilitate the development of the financial advisory capability of other financial advisors at CIBC.



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