EST. 1993 IRONSHIELD® FINANCIAL PLANNING

NO LIMITS Financial Planning™

Having spent over 30 years in the financial services industry, John brings a wealth of knowledge and experience to his clients, who are successful business owners and professionals. As John puts it, “Being a business owner myself, I share the same concerns and challenges as my clients.”

His fascination with money management started on "Black Monday" - October 9, 1987 - when global stock markets crashed. The next day, he skipped McGill University science classes to visit the Montreal Stock Exchange, igniting his interest and setting him on the path to wealth management.

John was an early adopter of the process of financial planning and was one of the first to obtain his Financial Planner designation in Quebec in 1998. After spending most of his career in the banking industry, his clients, mainly business owners, inspired him to venture out on his own and become an independent financial planner. After spending over two years working at his own firm, John was invited to team up with IRONSHIELD Financial Planning and opened the first Quebec branch in September 2017.

WWW.IRONSHIELD.CA

JOHN (KALOS) KALOGRIOPOULOS, CFP®
Financial Planner
johnkalos@ironshield.ca

EST. 1993 IRONSHIELD® FINANCIAL PLANNING

REVEALING UNTAPPED POTENTIAL TO KNOW NO LIMITS™

The Building A Foundation Program™

is designed to construct a solid foundation for your financial future. It emphasizes organizing your financial affairs, restructuring debt, and maximizing opportunities for creating wealth.

The Securing The Future Program™

is designed to take your success to the next level. Your retirement goals are on track, as are your children's (or grandchildren's) education funds, and you want to minimize your tax bill.

The Preserving Wealth Program™

is designed to protect either a windfall or the accumulation of wealth. Although this includes a reasonable rate of growth, the emphasis is on income with capital preservation.

The Corporate Class™

This includes a program enhancement for the individual who is also a business owner. It integrates both business and personal financial affairs, balancing the risks of business with the security of personal finances.

Author Of

Confessions of an Ex Banker
Podcast

Guest Columnist For

CANADIAN MONEY SAVER

Featured On

Build Wealth Canada
Podcast

How is my Financial Health, doc?
Podcast

moneygeek YOUR MONEY, SMARTER

THE GLOBE AND MAIL

CJAD 800 AM

THE KAIZEN Financial Planning Process™ CERTIFIED Trainer

John follows the disciplined KAIZEN Financial Planning Process™. Thinking "outside the box" to get to the heart of clients' issues and concerns about their finances allow them to progress beyond their perceived limits.

CFP®

Certified Financial Planner® certification is the most widely recognized financial planning designation and considered the standard for the profession. CFP® professionals demonstrate the knowledge, skills, experience and ethics to examine their clients' entire financial picture, at the highest level of complexity and work with them to build a financial plan.