



IRONSHIELD®
FINANCIAL PLANNING

NO LIMITS Financial Planning™

With two decades of dedicated expertise in financial advisory, Heidi Rumohr stands out as a seasoned professional in the realm of cash flow planning, taking a holistic approach to wealth protection and wealth accumulation. Her commitment to optimizing financial portfolios is underscored by a comprehensive understanding of the challenges business owner clients face, enabling them to navigate complexities and minimize liabilities effectively. Known for her keen sense of cash flow planning, Heidi has empowered numerous individuals and families to achieve financial stability and long-term success.

Heidi has a BA in Sociology from the University of Western Ontario; is a Certified Health Specialist (CHS), an Elder Planning Counselor (EPC) and Certified Cash Flow Specialist (CCS).

Beyond her professional achievements, Heidi is a wife and mother of two young boys. Balancing a successful career with family life, she brings a unique perspective to financial planning, emphasizing the importance of aligning financial goals with personal values. Clients appreciate not only her strategic acumen but also the genuine care and understanding she brings to every financial journey, making her a trusted advisor in both wealth management and life's meaningful milestones.



HEIDI RUMOHR

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REVEALING UNTAPPED POTENTIAL TO KNOW NO LIMITS™



Heidi 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.



The CHS is the only health insurance-focused designation in Canada, which strategically positions financial advisors to meet the growing market demand for informed living benefits advice.



The role of the Elder Planning Counselor holds particular significance when it comes to addressing the financial, social, or health-related aspects of seniors' lives.



A Certified Cash Flow Specialist™ is uniquely trained to build and create that strategy for you: giving you a clear path to your goals, designed with the money you already have.

The KAIZEN Financial Planning Process™ Is Suited To:

Business owners building retained earnings annually in closely held companies with families, living in Canada. They are tax frustrated with poor future planning and are seeking more control.