



**IRONSHIELD®**  
FINANCIAL PLANNING

*"I believe in two things: small business and independent advice, the cornerstone to personal economic growth. They are the reason IRONSHIELD exists."*

Early in his career, Scott realized that to serve clients well — i.e., give them financial guidance tailored to them — he would need to build an independent firm. He established IRONSHIELD in 1993, and today he and his team loyally serve family business owners who appreciate his genuine desire to bring order and coherence to their often-tangled, sometimes-neglected financial planning.

Always striving to get to the heart of clients' needs and present solutions simply and plainly, Scott is a firm believer in process. That has translated to The KAIZEN Financial Planning Process™, a process-driven framework that delivers clarity and control while providing flexibility for change alongside life's ebbs and flows. He's also passionate about continuing education. "You have to stay on top of today's quickly changing marketplace," he says. "New methodologies and strategies must support a disciplined implementation plan. You always have to navigate the ever-evolving changes to the Income Tax Act — the list goes on."

Scott earned one of the first CFP designations in Canada and has been recognized as one of Canada's Top 50 Financial Advisors. He was also awarded the MoneySense Approved Financial Advisor designation from MoneySense®, one of Canada's leading personal finance media brands.

At home in the Caledon Hills or at his cottage in the Laurentians, Scott embraces outdoor living, from windsurfing and waterskiing to tennis and golf, and especially enjoys cooking gourmet meals at home with his wife and business partner, Catherine and their two adult daughters, Devon and Skylar.

# NO LIMITS Financial Planning™



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# REVEALING UNTAPPED POTENTIAL TO KNOW NO LIMITS™



Scott developed The KAIZEN Financial Planning Process™ methodology. Financial planners across the country are joining the training academy every year to obtain their certification.



The Family Enterprise Advisor (FEA) is the global benchmark in family business advising. Scott is one of the few financial planners in Canada who obtained this high standard in family enterprise advising.



Scott was recognized as one of Canada's Top 50 Financial Advisors, and he continues to show his passion by providing unparalleled service for his clients.



Scott was awarded the MoneySense Approved Financial Advisor designation from MoneySense®, one of Canada's leading personal finance media brands. He has exceeded MoneySense's high standards in the areas of customer service, transparency and fees.

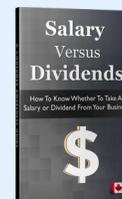
## The KAIZEN Financial Planning Process™ Is Suited To:

*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.*

### Author Of



**How To Choose and Work With a Financial Planner You Can Trust**



**Salary Versus Dividends**  
How to know whether to take a salary or dividend from your business

### Featured On

