



**IRONSHIELD**<sup>®</sup>  
FINANCIAL PLANNING

# NO LIMITS Financial Planning™

*“You might get there faster doing it all yourself, but you’ll go farther with the right team behind you. A good financial plan can have an impact that lasts for generations.”*

With an MBA, a Master of Finance, and her Chartered Life Underwriter (CLU) and Chartered Health Specialist (CHS) designations, Stephanie brings to IRONSHIELD a love of continued financial education and 15 years of experience across wealth and risk management, financial planning, and business consulting. Her expertise centres on franchise owners, and a passion for helping them address the unique capital demands, operational scale, and growth potential that comes with the franchise model.

Working alongside them to create a comprehensive, tax-efficient financial roadmap, she helps them overcome challenges such as mastering cash flow, securing expansion funding, tax law, and estate planning. She says, “I get such tremendous satisfaction from seeing them translate their hard work into financial freedom and long-term security, both for them and their family.”

When Stephanie isn’t working, she can be found rock climbing, skiing, or curled up with a good book.



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## REVEALING UNTAPPED POTENTIAL TO KNOW NO LIMITS™



Stephanie 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.



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



The Chartered Life Underwriter (CLU) designation holders are regarded as elite professional financial advisors who raise the bar in developing effective solutions in the areas of risk management, wealth creation and preservation, estate planning, and wealth transfer.



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 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.*