



Hello there! I'm Kate Thompson...

My career as Certified Financial Planner started because of a strong desire to teach people the basics of money management and financial stewardship. Like most, I had not learned in school how money works for and against us or how to develop and USE a budget. It seemed to me like a very simple but missing part of living life well. It was the beginning of a passion to help families to make wise decisions with what they earn, to live below their means and become exponential savers and givers.

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I PROVIDE THE FOLLOWING SERVICES FOR MY CLIENTS:

Comprehensive Financial Planning:

- Plan Development & Coaching
- Analysis of Insurance & Investment Needs
- Charitable, Tax & Estate Planning

Additional Services:

- Corporate Investments
- Group Benefits
- Investment & Retirement Plans
- Education Plans
- Insurance Solutions

I learned this first experience by having started my own family young and raising my two oldest children as a single Mum for many years. I know what it means to have more month than money, how to live on a single salary, make tough decisions, get out of debt, save for your first home, give and get more back than I could ever hope for! It was my foundation and learning time.

Over the past two decades I have been blessed with a wonderful husband, two more beautiful children and a whole new set of stuff to learn! How to work out his, mine, ours with kids going in all different directions and learning how to do it with love! This motivated me to continue my education and inspires what I share with you.

My loyalty and ability to coach people with their money is different from what a lot of my clients tell me they expect. It is a relationship – always evolving, changing and growing. Putting ‘stuff’ or products in place is important but understanding why, is imperative.

If I understand where you are at and what I think you need to ‘do’ then I am an advisor. But, if I know you enough to also understand what keeps you ‘up at night’ and can help you achieve peace and clarity, then I am a good advisor and friend. Together we navigate the financial challenges of everyday life and develop strategies to help you achieve your goals and dreams. It not always easy but with a good friend with you along the road its possible.

I look forward to the opportunity to get to know you and see what I can help you accomplish!

Sincerely,



Kate Thompson, CFP
Certified Financial Planner

WHAT SOME OF MY CLIENTS HAVE TO SAY...

Trans World Radio Canada has partnered with Robertson Hall Insurance for our charitable insurance and liability needs for many years. Expanding that partnership in 2010 to work with Kate Thompson of Robertson Financial Group was the right move. Kate carefully manages our organizational investments within the parameters of our own investment policy. She also manages the group retirement savings plans for our staff and missionaries going the extra mile to accommodate those who live and work in different time zones and countries around the world. Kate is particularly effective at explaining concepts simply, and putting anxious minds at ease.

Ray Alary,
President
Trans World Radio

Jason Brown,
Director of Operations
Trans World Radio

Our Daily Bread Ministries Canada has been working with Kate Thompson for over a year now and has found her professionalism and insight to be of the highest standard. Kate understands our needs and how we operate, is able to give advice on investments based on our investment policy, maintains consistent contact with our organization, and attends to the individual needs of our staff retirement program. Kate is able to quickly access information we request and is always able to get answers for the questions we have. We have found our investment portfolio to be well taken care of with Kate and have been impressed with how easy and friendly Kate is to deal with no matter what our need.

Brent Hackett,
Executive Director/CEO
Our Daily Bread Ministries Canada
