The value of choosing Accredited professionals committed to your success

Our team believes that lasting client relationships are built on trust, transparency, and proven expertise. Each of us pursued advanced professional designations to ensure that the advice you receive is grounded in the highest standards of education, ethics, and industry experience.

When you entrust us with your financial future, you deserve to know the depth of knowledge and professionalism guiding your decisions. The designations beside our names are not just symbols — they represent years of study, rigorous examinations, and a dedication to client service at the highest level. By achieving these credentials, our team demonstrates a shared commitment to making complex wealth strategies clear, effective, and always aligned with your best interests.

Please feel free to visit our website at www.lisathompsonfamilywealth.com to review the bios of each of our team members.

What are Professional designations? Professional designations are the sets of letters that appear after our names in our business cards, email signatures, websites and many other places. We have outlined below what each of these professional designations stands for, and why they matter to the advice and service you receive.

FCSI: The Fellow of Canadian Securities Institute (FCSI®) designation is the highest credential awarded by the Canadian Securities Institute (CSI). The Fellow of CSI is held by a select group of financial services professionals in Canada that have met standards for industry experience, advanced education, ethics, and whom have been endorsed by peers and superiors.

CIWM: The CIWM designation is a globally respected credential for advising high-net-worth clients. It confirms advanced expertise in international wealth management, including portfolio strategy, estate planning, and cross-border considerations. Co-granted by the Canadian Securities Institute and the Association of International Wealth Management, the CIWM is a mark of global competence and relevance in serving sophisticated investors.

CIM: The Chartered Investment Manager (CIM®) designation is the industry standard for discretionary investment and portfolio management services. It ensures that those who hold it are qualified to construct and manage investment portfolios on behalf of clients, while adhering to strict regulatory requirements. This designation confirms the ability to provide disciplined, professional investment management for today's increasingly sophisticated clients.

CFP: A Certified Financial Planner (CFP®) is awarded by the Certified Financial Planner Board of Standards, Inc. The CFP designation is the most widely recognized financial planning credential worldwide. Earning it requires years of education, comprehensive exams, and a demonstrated commitment to ethics and client-first service. CFP professionals are trained to look at all aspects of a client's financial life — from retirement and investing to tax planning and estate considerations — and provide holistic, long-term strategies.

TEP: Trust and Estate Practitioner (TEP®) The TEP designation is an internationally recognized credential for professionals who specialize in trusts, estates, and succession planning. It signifies deep knowledge in helping families and business owners protect, transfer, and preserve wealth across generations. Advisors with the TEP designation are well-versed in the complexities of cross-border planning, taxation, and legal structures that support long-term financial security.

LLQP: The LLQP is the certification required to provide insurance advice and solutions in Canada. It ensures that advisors are licensed to help clients with insurance-based planning, including risk management, income protection, and estate planning strategies. Holding this credential demonstrates the ability to integrate insurance into a comprehensive wealth plan, offering clients an additional layer of security and peace of mind.

To maintain the professional designations and accreditations we have achieved, we are required to complete ongoing education and training each year. This commitment ensures we remain knowledgeable, adaptable, and prepared to meet the demands of an evolving financial landscape, allowing us to continue delivering advice that reflects the highest industry standards.

Lifelong learning is an important part of our culture, but just as important is the trust our clients place in us. We are proud to serve as a resource for you and your family, and we welcome your questions at any time.

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