

Ian R. Whiting

CD, CFP, CLU, CH.F.C., FLMI (FS), ACS, AIAA, AALU, LSSWB
Qualified Provincial and Branch Compliance Officer/Manager
Qualified Trading Officer, Partner and Director for Mutual Funds
Associate Member, Association of Certified Fraud Examiners
Member – Disciplinary Hearing Panel – FPSC – 2015-17

With a 48th industry anniversary coming on November 1st of this year, Ian is an acknowledged leader and sought-after presenter. After starting on the administrative side of the house, he moved into the field in 1976. Throughout his career, he has attended numerous **Schools in Agency Management and Sales Management**. He obtained his **Chartered Life Underwriter (CLU)** in 1987 while also completing his **Investment Funds Institute of Canada Mutual Fund** qualification and **Fellowship in the Life Management Institute** with a specialty in **Financial Services**.

In 1989, he was awarded the **Chartered Financial Consultant** designation. In 1992, he qualified as an **Associate of the Academy of Home Office Life Underwriters** (Head Office underwriter qualification) and in 1993 he completed his **Associate, Customer Service** designation program through the Life Office Management Association.

In 1997, he qualified as a **Certified Financial Planner (CFP)** and completed the courses and exams to obtain the **Associate, Insurance Agency Administration** designation. In 1999, he completed the examinations to qualify as a **Trading Officer, Partner and Director** for Mutual Funds. Additionally, he is an Associate Member of the **Association of Certified Fraud Examiners**. In 2016, he successfully completed the **ETF Marketing** course through the Canadian Securities Institute.

Long known as an innovative, creative and forward thinker in the financial services world, Ian enjoys the challenge of learning new material and planning for the future evolution of our profession. As the past-Senior Editor and a Contributing Writer to **MONEY MAGAZINE**, Ian is recognised throughout the financial services community in Canada. He also teaches a wide range of financial industry qualification and designation courses through **Ashton College** in Vancouver (HLLQP, IFIC and the entire CLU, CHS and CFP programs).

As a **Marketing Director** and **Financial Planner** with Customplan Financial Advisors Inc., Ian uses his qualifications to expand advisors' proficiency in both operating their businesses effectively and serving the needs of their clients. He is a Principal of **Financial Transition Resources Ltd.** and can be reached by email at iwhiting@fintranresources.ca or by phone at 604.888.3078.

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