THE WOMEN OF ASSANTE HYDROSTONE

EDITOR'S NOTE

When we were putting together this feature, we joked that 20 years ago there would only have been one page. One woman advisor in an office of 20 advisors.

Now we have a growing team of women who are making a big impact with their clients. Investors are demanding more from the wealth management industry than simple money managers - they want to build relationships. And that's what the women advisors at Assante Hydrostone do - with each other and their clients.

Working with this team of women, it is clear how rich their talent is. They have grit, determination, and an unwavering work ethic. And most importantly, they truly care about their clients - not just their portfolios, but their hopes, their dreams, and their goals.

Meet the Women of Assante Hydrostone!

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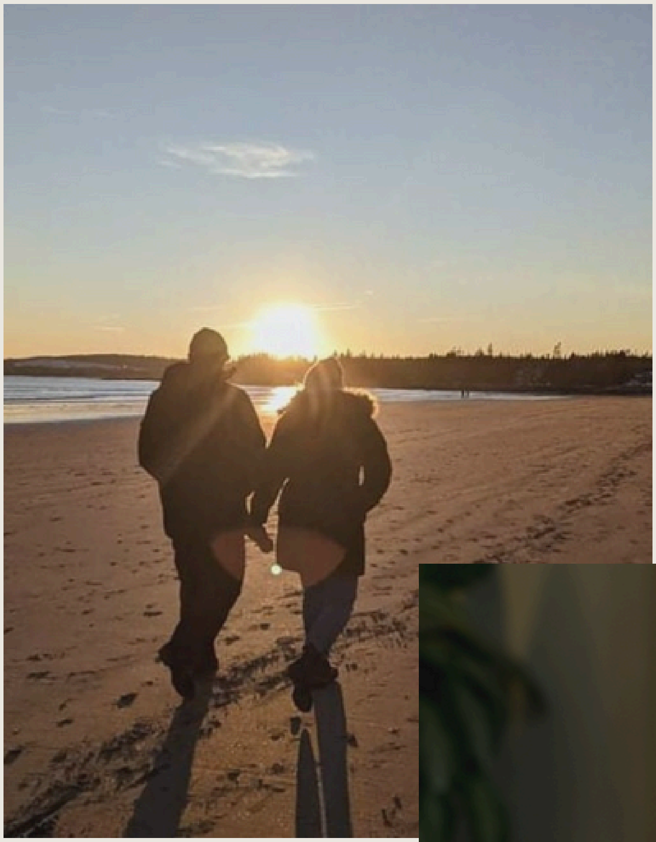


EMILY RAE

What impact do you want to have on your clients? Why do you do what you do?

I want clients to reach their financial goals, I want them to feel like they are well taken care of and I have their best interest in mind when making a recommendation based on their individual needs.

I am a financial advisor because I grew up in a family where we were taught good money management skills and strategies around growing wealth and I feel like I can listen to clients, hear what they are saying and explain how making small or big changes in their life will impact their goals. Also, I really like building long-term relationships with clients so it is a perfect fit for me.

What's the most important thing to you about running your business? What are your goals for your business?

Working in the industry for over 30 years, adaptability is the most important part of running my business. The ability to make changes to a business plan and make adjustments is key. Covid was an excellent example of this where the entire business went virtual within days, this insured clients were not impacted as we could meet via phone, zoom or email instead of in person.

My goal for the future of my business is to continue working with clients and their changing needs and demographics point to a large group retiring and their parents having complex Estate needs.

When are you happiest?

I am happiest when I am outdoors in our beautiful province.

What motivates you? Professionally or personally?

I am motivated by excellence in my career and making an impact with clients when they have complex financial needs.

What would you tell aspiring women advisors about working in the wealth planning industry to set them up for success?

It is an excellent industry for Female Advisors. I would say to future advisors – take risks, have a commitment to industry education, find a group of like-minded advisors for support, ask a lot of questions and go for it!

JENNIFER RIDEOUT

What's the most important thing to you when it comes to running your business? What are your goals for your business?

Firstly, I try to take good care of my health as I can not help others without helping myself first. My business is not a 9-5 job; it is a lifestyle. My clients know that I am always here for them.

I want my business to be sustainable and elegant. I want to create a rewarding space for my employees who are inspired to live their best life and to go above and beyond for my clients. I love coming to work every day and I want the same for my staff.

What impact do you want to have on your clients? Why do you do what you do?

I want to help my clients live a life of significance. I am passionate about this industry and helping families live healthy financial lives.

When are you happiest?

Nothing beats helping my clients reach a goal. Or when I am running or having fun with my kids!

What motivates you? Professionally or personally?

Wealth, family, health and wellness. I feel very privileged to have my own business and be a mother to two daughters.

What would you tell aspiring women advisors about working in the wealth planning industry to set them up for success?

Never give up and it is never too late to make changes!

KAILEIGH VAN DEN BERG

What impact do you want to have on your clients?

The impact I want to have on clients is ensuring that they feel confident and secure in their financial future.

People can find dealing with their finances intimidating and I want to break that narrative.

I help clients identify what their financial goals are and have the assurance we will reach them together, whatever they may be.

What's the most important thing to you when it comes to your client relationships? What are your goals?

The most important thing for me when it comes to clients is a trusting relationship where they feel comfortable discussing their goals and concerns. My goal is to create an empowering environment through communication and education.

When are you happiest?

I'm the happiest when cooking for friends and family. I love planning out a menu for a dinner party and then making it all come together to share and enjoy with the people I love.

What motivates you? Why do you do what you do?

Knowing that I've made a difference in someone's life. Whether it's creating a plan to buy their first home, saving for a child's education, or funding retirement, we get to celebrate these wins alongside you. It's purpose-driven work, and I find that really motivating.

What would you tell aspiring women advisors about working in the wealth planning industry to set them up for success?

I would tell other women to embrace the qualities we inherently have, rather than trying to suppress them to fit in what has historically been a very male-dominated industry. Our compassion, empathy, and vulnerability are what allow us to build meaningful relationships with clients.

NATASHA DOWDING

What's the most important thing to you about running your business? What are your goals for your business?

The most important thing about running our business is providing a consistent level of service to our clients. The financial markets are impacted by a range of factors and every year is different. The same can be said about our clients' lives – things change, life is not a straight line. The goal is to keep clients informed about market factors that directly affect their investments and to keep their financial plans up to date when circumstances inevitably change. This offers them comfort and clarity around how they are going to reach their financial goals.

What impact do you want to have on your clients? Why do you do what you do?

I truly love to help others, especially when it comes to navigating their financial journey. As a Financial Planning Advisor, I want to make a positive impact on my clients' lives by helping them make informed decisions to reach their financial goals and improve their financial well-being while building strong and meaningful connections.

When are you happiest?

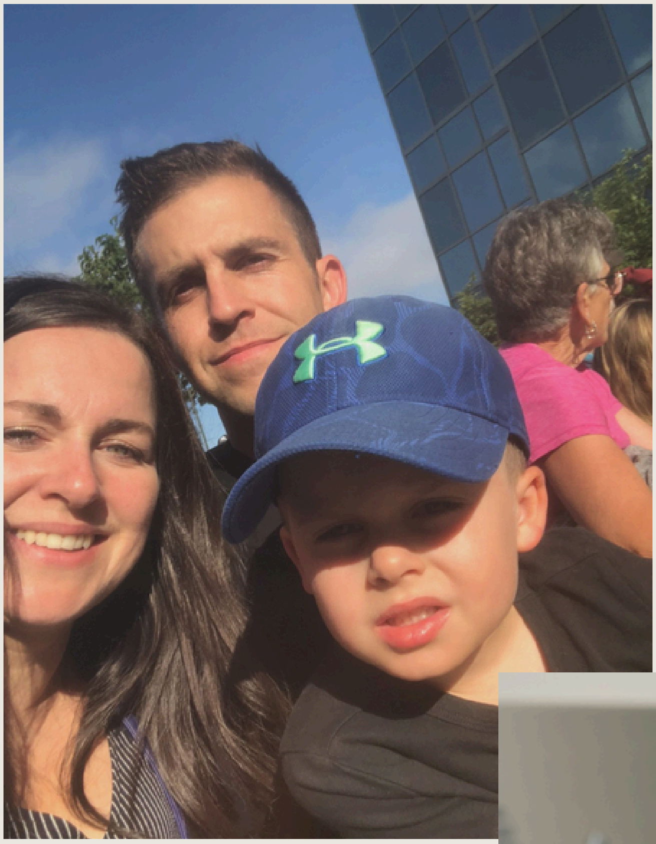
I am happiest at work when I can provide peace of mind for our clients when it comes to their financial goals and future. Outside of work, I am happiest when I am spending time with my family and exploring the outdoors.

What motivates you? Professionally or personally?

Knowing that I can make a positive impact on our clients lives by improving their financial literacy and working together to make a plan they can follow to be financially secure.

What would you tell aspiring women advisors about working in the wealth planning industry to set them up for success?

Treat every professional experience as a learning opportunity that will help you reach your professional goals. Don't be afraid to ask questions and advocate for yourself and know that you deserve a seat at the table. It's a good idea to find a mentor in the industry.



JESSIKA BLACKBURN

What impact do you want to have on your clients? Why do you do what you do?

I want my clients to feel heard, understood, and supported in their goals, and to have the confidence and peace of mind that they're on the right track. I want them to know that I am always working with their best interest in mind and that they don't have to worry about all the overwhelming details. I want them to feel taken care of.

And if I can accomplish that, I get to leave work every day feeling like I've made a difference in people's lives. And there's no greater feeling.

What's the most important thing to you about running your business? What are your goals for your business?

The most important thing for me is looking at every aspect of my clients' financial lives holistically, anticipating the questions they may have, and finding the best solutions to set them up for success during every stage of their lives.

When are you happiest?

Professionally, I am happiest when I'm connecting with my clients and strategizing for their goals.

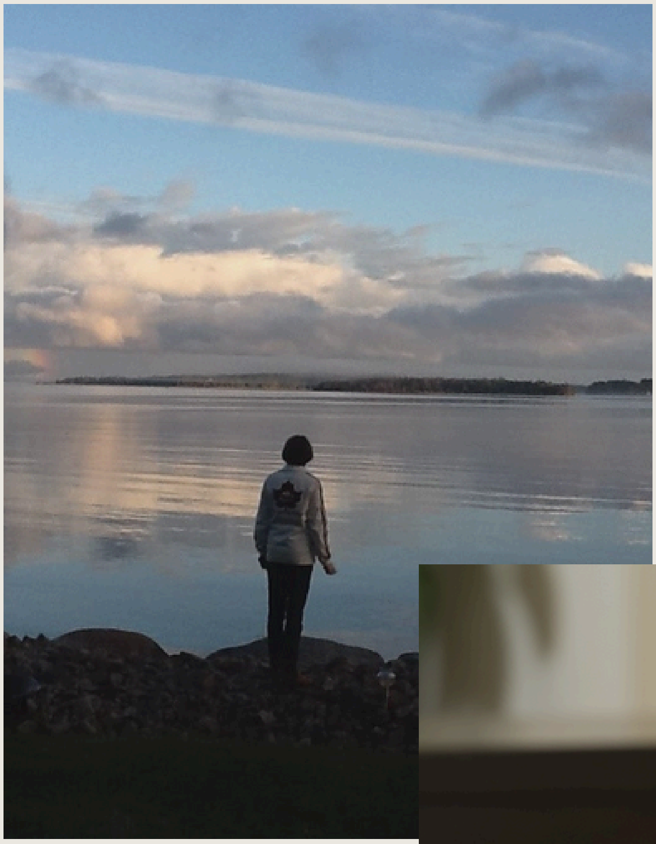
But spending time with my family refills my battery. I'm a busy mom of a busy kid and I love being involved with his activities and being present for all those little moments with him.

What motivates you? Professionally or personally?

I have always been motivated by a challenge. The feeling of accomplishment you get when you succeed is what drives me. When you challenge yourself to be better than the day before, you make small ripples that can make a big impact on yourself and your clients.

What would you tell aspiring women advisors about working in the wealth planning industry to set them up for success?

Challenge yourself and prioritize professional development. This is a rewarding industry, and all the hard work is worth it when you know you've made an impact with your clients. I love my career.



JANE SMITH

What impact do you want to have on your clients? Why do you do what you do?

I like to take some of the mystery out of the investment business. Clients are often confused about all the products and the terminology.

I say, "let's determine where you are now, where you want to be, and how best to get there with as little risk as possible and a high degree of probability."

When a client says, “well, I wouldn't be financially secure if it hadn't been for your guidance,” that is pretty rewarding.

What's the most important thing to you about running your business? What are your goals for your business?

I want to leave every day feeling that my clients feel that they have someone by their side for their financial journey.
The goal of my business is to ensure that my clients feel they are listened to and that the plans and investments are suited uniquely to them.

When are you happiest?

Personally, I am happiest when I am spending time with my family and friends, taking long walks, and time at the cottage. Professionally, knowing you have positively impacted a client's financial health is a pretty awesome feeling.

What motivates you? Professionally or personally?

On a personal level, my family is my motivator. As a single mother for much of my career, I wanted to show my children that I belonged in the financial services business, the value of hard work, and the rewards. Professionally, I just genuinely love interacting with a variety of interesting people. When you think about it, people are sharing very personal information with us. It is an absolute honour that they put their trust in us. I take that trust very seriously.

What would you tell aspiring women advisors about working in the wealth planning industry to set them up for success?

Setting up for success as a female wealth planning advisor means being your authentic self. I believe women are uniquely suited to the wealth planning industry. Generally speaking, women may be considered good listeners and empathetic. These qualities are essential in building a wealth planning practice. I would also let a female advisor know that it can be pretty hard work at first, but the rewards, both professionally and personally, are absolutely worth it.

DANAH MACDONALD

What drew you to this industry?

I had family members who talked openly with me about personal finances and the positive impact that working with a financial advisor can have on your life.

My grandfather took me to a meeting with his advisor when I was in my first year of university and from that point, there was no turning back. I knew this was the career path for me.

How do you see yourself in this industry in 5 years? 10 years? What are your goals for the future?

I am pursuing my CFP® qualification. I look forward to the day when I can confidently help clients build their wealth and plan for the next generation. Giving clients peace of mind that their financial future is on track is an important part of what draws me to this profession.

What motivates you? Professionally or personally?

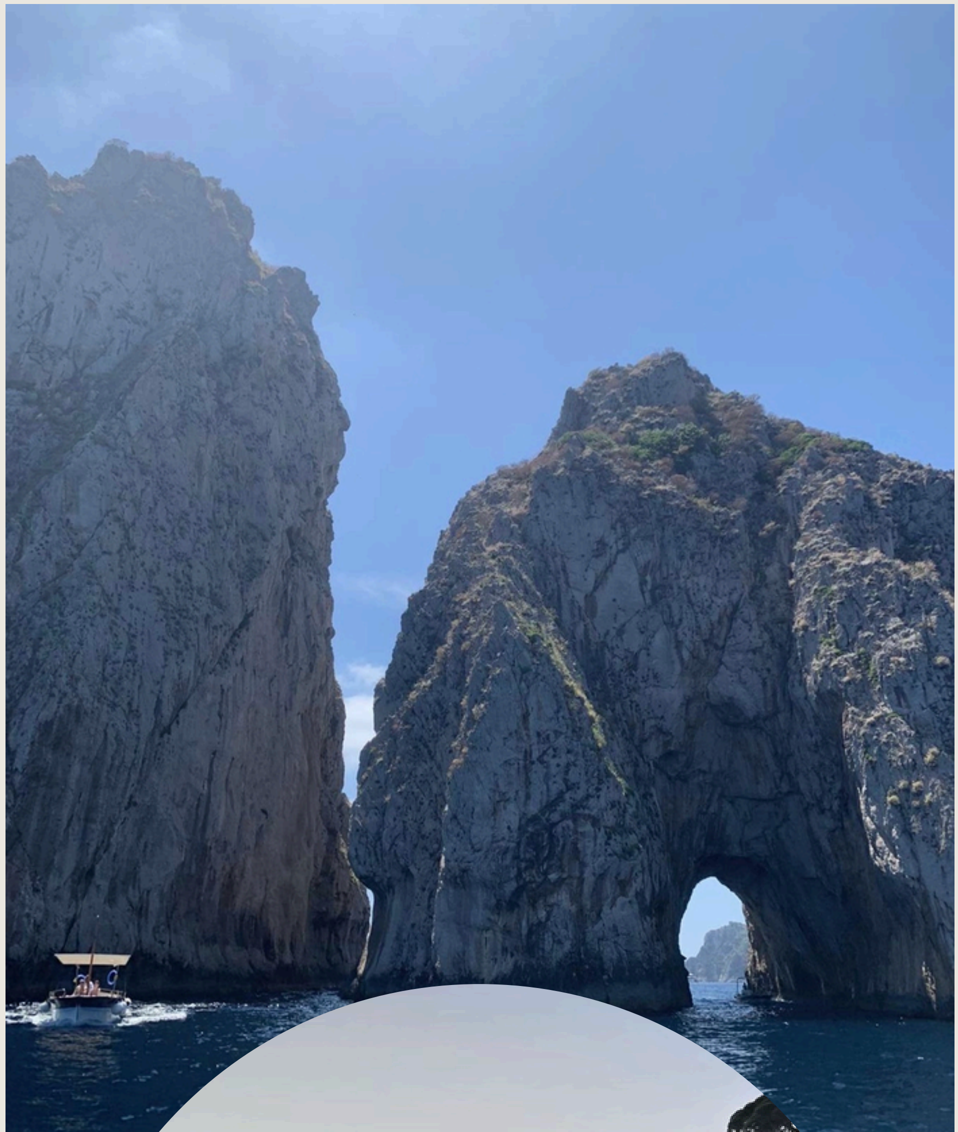
Financial literacy is so important to success in life. I look forward to helping people understand how to make their financial goals a reality, particularly underserviced groups such as women of colour and indigenous communities.

When are you happiest?

I am happiest at work when I am contributing to our clients' success.

What would you say to other aspiring women advisors based on your own experience in the wealth planning industry so far?

The industry needs more women. Your personal experiences and insights are valuable assets and will enable you to connect with a broader cross-section of clients.



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