



October 26, 2020

Nathan McLeod - Certified Financial Planner & Ian Mooney - Certified Financial Planner  
have merged practices and company infrastructure to better serve you.

### **Background**

We are happy to report that the merger between the financial planning practices of Nathan McLeod and Ian Mooney has completed. The new name that you can expect to see will be McLeod Mooney Certified Financial Planning.

Having started their practices independently, Nathan's focus has been in the designing, care and management of numerous Pensions and Group RSPs. He has had the pleasure to serve thousands of Canadians offering financial knowledgeable and independent financial advice to many families whom may have not have had access to a Certified Financial Planner if their employers hadn't set up their Group RSP or Pension through Nathan. Nathan as worked in tandem with [Booth Scott](#) since 2011, this merger will not affect negatively that relationship at all, in fact we expect it to strengthen.

Ian's background before becoming a licenced financial advisor and Certified Financial Planner was in the mining and mineral exploration industry. He left that field and opened his independent financial advisory practice in 2014 and has served at the pleasure of hundreds of Canadians from all walks of life, from business owners, to mining executives and tradespeople alike.

*Nathan and Ian recognize that their past independent successes would not have been possible without you, we are honored to work for you, and we look forward to your continued support.*

### **Why the Merger?**

Of the many ideals that Ian and Nathan agree in; financial literacy as an essential life skill for all is paramount. We firmly believe in education for our clients. Providing our clients with the critical tools needed to help in deciphering the Canadian financial landscape and helping them make educated financial decisions is what we have always done, and what we will continue to do.

If you work with us through one of the Group RSPs or Pensions that we currently manage than you've likely seen us in your company boardrooms offering financial wellness seminars and individual financial planning sessions to those who wish to meet with us. If you work with us through our individual financial planning



practices than you've heard from us often through in person meetings, bi-annual reviews, newsletters or more recently Zoom meetings.

This merger will strengthen our ability to serve *you* through multiple office locations, multiple Certified Financial Planners to talk to, and a streamlined administrative staff to field your calls and inquiries. We promise you here, as our client base continues to grow in additional pensions and individual family clients so will our team with additional Certified Financial Planners and administrative staff ensuring a timely response to all your financial questions and concerns.

### **Why Complete this merger now?**

With the Covid – 19 pandemic front of mind for all of us, we did take the timing of this merger into account.

What we have experienced since the start of this pandemic was hundreds of our pensions employees either laid off (some temporarily, some permanently) and others change jobs all together. This has caused us to be in constant contact with many of you in assisting you in setting up personal accounts to move your pension assets into, or in some cases with withdrawals due to the financial hardship that this pandemic has caused. Having 2 of us to help with the meeting requests has notably been beneficial for all.

The merger of our practices and streamlining of administrative staff was a natural progression over the past 6 to 12 months.

### **What this means for you, our valued clients.**

The level of service, care, and communication will be stronger. We now have 2 office locations to serve you for in person meetings and appointments, as well many of you know our wonderful client care specialist Dawne Pongracz. Dawne will still be there to work with each and everyone of you as she always has.

So essentially this merger should allow for shorter lead times when trying to book an appointment, more convenient office locations, and the continued care and attention that you should expect of your Certified Financial Planners.

## **Thank you**

**Once again, we'd like to thank you for trusting us with your pensions, investments, insurance, and estate planning needs. Without the wonderful clients that we have, we would not be possible. We look forward to continuing to work with each and everyone of you now and for many years to come.**