

Changes happening at Assante office in King City

By Bill Rea

Changes are in the works at Assante Wealth management in King City; in terms of faces.

McClelland Financial Group of Richmond Hill has joined with Flavel Barrett's financial planning service.

"Nothing has changed in terms of the values being the same," commented Financial Planning Advisor Mary Rourke.

Senior Financial Advisors Robert McClelland and Mike Connon, along with Financial Planning Advisor Nicole Fear have joined with the team already at the King City location.

McClelland said this is a partnership, in terms of the joining of two branches. He

added the long-term arrangement will see Barrett retiring, while his team and the new group of advisors work with his King City clients.

He also stressed it was important to Barrett that his clients were looked after. "The clients, for both of us, are number one," he commented.

McClelland said they discussed their respective service philosophies, and how to invest assets to take people into their retirement, and "take the financial worries off their plates."

He added the name of the business will remain the same. "At the end of the day, we're Assante," he said.

The investment business

is a complicated one these days, with some 6,000 different mutual funds in Canada, and new products being launched every day.

McClelland Group has been operating out of Thornhill for the last three years, in a historic house, much like the one in King City. McClelland said they were looking for a setting like that; easily accessible with free parking. "We want to create an environment the client enjoys being in," he commented.

Connon added being in a historic building helped them become part of the community in Thornhill, and they hope that's the case in King City. "Once in a historical building, just be

default, you're part of the history of the town," he said.

At this stage, McClelland said the main objective is getting to know the client base, and letting both the clients and advisors get to know and understand each other.

There are no major changes planned to the way the service operates. They are both young men, but Connon has 15 years experience in the business and McClelland has 16. Connon remarked they're both young enough that they won't be turning things over to someone else for a while, so clients will be looking at at least 20 years of stability. He added that's one of the things Barrett was after. "It gives his clients a lot more peace of mind," he commented.

Technology will be at the heart of some changes, though. McClelland said they have been at the forefront of what's available, in terms of e-mail and Internet access, which will help speed things up. He added more than 80 per cent of their clients regularly use e-mail.

Connon added that since

all the clients have individual financial plans, the technology allows for their information to be accessed sooner to deal with questions. "It lets us give accurate answers to a lot of questions clients have," he said.

McClelland also said they plan to have regular face-to-face contact with clients, with the idea of having two to four meetings per year, discussing different aspects of their plan at each session. They also intend to examine each client's plan at

least every 18 months. "Things change," he observed, pointing out it's important to keep everything up to date.

He added it's especially important for people to keep track of where they are if they're within 10 years of retiring, or in their first 10 years of retirement.

Connon added he's seen many cases in which he's advised retired people not to save as much, but spend some of their money on things like travel while they're still able to enjoy it.



The Assante team in King City now consists of Rob McClelland, Mike Connon, Nicole Fear, Jean Constable, Flavelle Barrett, Phyllis Lundrigan and Mary Rourke.

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May 15 to 17	Rochester Lilac Festival	490.00 TWIN 620.00 SINGLE
June 4 to 6	Windsor & Point Pelee	485.00 TWIN 560.00 SINGLE
June 13 & 14	Overnight Tour to Stratford Festival	365.00 TWIN 445.00 SINGLE
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