# Simon De Groot,

## CFP®, CIM®, FMA

### Associate Portfolio Manager & Senior Investment Advisor

Simon De Groot has more than 30 years in wealth management, helping successful individuals and families simplify complexity, preserve capital, and generate reliable income. He holds the Certified Financial Planner (CFP®), Chartered Investment Manager (CIM®), and Financial Management Advisor (FMA) designations, supporting a disciplined approach to portfolio construction and long-term planning.

His philosophy is simple: protect what matters, grow with purpose, and create clarity. He focuses on high-quality investments, consistent cash flow, and thoughtful asset allocation, so clients can act with confidence, not react to market noise.

Raised on Vancouver Island, Simon values balance and brings that perspective to clients, aligning wealth with the life they want to live. Simon advises a select group of high-net-worth families, offering personalized guidance and a long-term relationship grounded in trust, discipline, and clear communication.

His wife and their two grown daughters keep him focused on stewardship, legacy, and doing things the right way.

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