

Rona Birenbaum

Founder and President at Caring for Clients

Toronto, ON, CA

Personal Finance Expert, Entrepreneur, Working Mom

Biography

Rona has worked in financial services for over 25 years within the Credit Union, full-service brokerage and independent Financial Planning industries. She founded Caring for Clients, a fee only financial planning firm in 2000. She is an Honours graduate of York University's Business School, a Certified Financial Planner (CFP), and an Insurance Advisor. Wealth Professional Magazine named Caring for Clients one of the top Independent Firms in Canada and Rona one of the top 50 Advisors in Canada three years running. She has developed an outstanding team of four financial professionals and as a team they deliver outstanding value to their diverse clientele. Rona is frequently contacted by the media as a resource on a wide range of financial planning subjects and is a MoneySense Approved advisor.

Industry Expertise

Financial Services, Insurance, Investment Management

Areas of Expertise

Financial Planning, Personal Finance, Personal Insurance, Investment Advisor Best Practices, Investment Advisory

Affiliations

Financial columnist - The Medical Post, Financial Sector Advisory Board Member - Centennial College

Event Appearances

Numerous print and video interviews by Canadian Media
various

Financial Planning When Everything Has Changed
Camp Widow

Financial Planning is not investment advice
Lunch and Learn

Three Investing Secrets You Need to Know
Lunch and Learn

Money Concerns and Career Planning
Cannexus

Education

Shulich School of Business - York University
Marketing Honours Commerce

Financial Planners Standards Counsel
CFP Financial Planning

Canadian Securities Institute
csc Investing

Accomplishments

Wealth Professional Top 50 in Canada
Identified as one of the top financial advisors in Canada.

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Wealth Professional Top Canadian Independant Firm (less than 10 employees)
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