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Michael K. Robinson

The "advisor to the advisor!"

Mike Robinson is an engaging and accomplished speaker on financial planning and wealth management. Mike has spent over ten years in the financial services industry; most of those years spent as an advisor and educator to financial advisors working in the affluent and self employed market. Mike's expertise lies in creating financial programs that provide a clear path to achieving financial goals, incorporating complex planning issues relevant to the affluent and self-employed market, such as minimizing tax on investments and assets, protecting business assets, retirement planning and risk management. Mike founded his own firm in 2006. Based in Calgary, Alberta Signature Financial Security is a professional, independent wealth management and retirement planning firm that specializes in working with successful self-employed individuals.

Speaking Topics

Keep the Tax Man out of Your Pocket –tax minimization strategies for the affluent.
When holding money outside of an RRSP tax is due on the growth in the account. Conservative vehicles such as bonds, T-bills and GICs contribute fully taxable interest income that can take a significant bite out of after-tax returns. There is a better way! Mike Robinson walks through alternative strategies to investing money outside of an RRSP yet ***with tax efficiency*** and without changing your investing strategy.

Building an Effective Business Plan –for your financial security.
Any expert will suggest that in order to be successful in business you need a business plan. So why would your financial affairs be any different? An expert in creating customized financial programs, Mike Robinson will outline the key elements for implementing an effective financial plan that creates a clear path to achieving your financial goals.

Five Essential Elements of Wealth Management for the Affluent
Successful self-employed, and other affluent, individuals have needs and options that the average Canadian may not. Particular attention needs to be paid to issues such as tax minimization on assets, the impact of fees, the availability of investment options and effective modes of wealth transfer. In this discussion Mike walks through five essential issues the affluent absolutely must know about.

Protecting Your Company's Most Valuable Asset –YOU!
If you are the main driver of your business, what would happen to your company and your employees if you were unable to work for a period of time? Would bills be paid? Would employees have job security? Learn from Mike effective risk management strategies to protect your company, as well as your own financial security, in the event that you are off work due to an unexpected illness or accident.