Biography - Robyn K. Thompson

ROBYN K. THOMPSON, CFP®, CIM®, FCSI® is a financial expert and seasoned wealth management professional. With wide-ranging experience as a professional money manger and wealth advisor in today's turbulent financial markets, she is the founder of Castlemark Wealth Management Inc., serving the wealth management needs of high net worth families and individuals.

A DEPTH OF EXPERIENCE

With a decade in the financial services and money management sector, Robyn has the experience, expertise, and credentials needed to meet today's challenging financial environment. She holds the Certified Financial Planner (CFP) designation, Canada's most respected designation for Financial Planners. She also holds the Chartered Investment Manager (CIM) designation, indicating the attainment of the professional standards and expertise necessary to provide money management services to high-net-worth and institutional clients. Robyn is also a Fellow of the Canadian Securities Institute (FCSI), the highest honour and most senior credential in Canadian financial services.

In addition to founding Castlemark Wealth Management Inc., Robyn is registered with the Ontario Securities Commission as Associate Portfolio Manager at R.N. Croft Financial Group Inc.

COMMUNICATIONS EXPERTISE

Robyn also puts her financial expertise to use promoting financial literacy, especially for young people through her association with Junior Achievement. She is an accomplished financial journalist, speaker, and communicator, with an ability to cut through financial jargon and simplify difficult concepts for laypeople. With a high comfort level in front of the camera, she was for many years co-anchor and producer of "Investment Television" that aired on Global Television, one of Canada's most-watched personal finance programs.

She has appeared regularly as a financial expert in a variety of media channels, including Global News, CTV Your Morning, BNN Bloomberg, CityNews Channel, GlobeInvestor "Carrick Talks Money," CHCH TV Morning Live, and CJAD radio.

She is a regular contributor to Fund Library, and has also been featured in many publications across Canada, including The Globe and Mail, The Toronto Star, Investment Executive, The Hamilton Spectator, FP Canada, Golden Girl Finance, Yahoo! Canada Finance, and Shaw Connect Investing.

An accomplished and dynamic speaker, Robyn has been the featured speaker at such venues as the sold-out "Stock Market Wears Prada" event, hosted by Chatelaine magazine and Golden Girl Finance in Toronto.

PROFESSIONAL CREDENTIALS, PROFESSIONAL CREDIBILITY

In addition to holding the CFP, CIM, and FCSI designations, Robyn is a member of the Financial Planners Standards Council. She is a graduate and member of both The Canadian Institute of Financial Planning and the Seneca College Financial Planning Program. Additionally, Robyn is licensed with the Financial Services Commission of Ontario and acts a Life Insurance and A&S Insurance Agent.

She has a depth of experience that includes many years of personal and family financial planning for both individual and family clients, with an extensive background in advising clients on how best to establish and integrate investment portfolios into an overall lifetime plan that also includes tax, retirement, and estate planning.

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