

Profile: Brian McMillan, Team Approach Planning

Brian McMillan CFP, CLU, CH.F.C. EPC is principal and visionary of Team Approach Planning and believes that financial planning is not just about the money. Planning is really about people, relationships and understanding what they value. Financial planning helps to formulate solutions that match the goals and objectives. Like his company name reveals, Team Approach Planning, Brian uses a team-oriented and collaborative approach to plan your family or business success. Together, his team tackles the full spectrum of financial planning initiatives, whether you want to increase cash flow, reduce debt, manage risk or growing investments while minimizing tax. He and his team work collaboratively with lawyers, accountants and other professionals to get the best solution for their customers.

In today's world of information overload, having access to a team of professionals that can help you understand your options and make informed choices makes a lot of sense. People moving to the area will eventually look for someone to deal with in their own community. Driving back to the city for meetings when you live up here eventually gets tiring. Brian and his team work mostly by referral but are willing to meet to see if there is a fit with their team and people's goals and expectations.

Brian recently completed his Elder Planning Counselor designation. As people age they are facing new challenges and helping people become prepared for change in health, income needs, accommodations etc., is crucial to the success of any financial plan.

When he isn't helping his customers plan their finances, Brian is known to express his creativeness in water colour as a locally recognized and celebrated artist. His paintings often depict people, landscapes, and water which have been featured in places such as the Rotary of South Georgian Bay calendar and the walls of Team Approach Planning. This office is more like an Art Gallery than a financial planning office. "Situations happen every day in life and are fun to capture and paint," says Brian.

His true passion for painting, coupled with his friendly and caring personality have all been catalysts in triggering the demand for his work. He sells his impressive paintings as well as limited edition cards of them, with the proceeds going to support Brian's charitable and mission activities which include First Presbyterian children initiatives, mission work involving youth, African mission, The Door, Youth for Christ, Power to Change, supporting mission awareness and fundraising, Cystic Fibrosis, Cancer research and many more.

If you want to work with a financial advisor who cares more about you than your money, or if you are celebrating a special occasion and you want to purchase a personalized gift for that perfect someone, contact Brian and he will gladly create your water colour masterpiece.



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