

Business Profile: Brian McMillan, Team Approach Planning: Planner by day, Artist by night



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 in life. Financial planning helps to formulate solutions that match their goals and objectives” states Brian. 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; such as managing cash flow while minimizing tax, reducing debt, managing risk and growing investments or estate planning. Brian 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 by appointment, to see if there is a fit with their team, and your goals and expectations.

In addition to a lengthy list of financial designations, Brian has 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, and can be seen on the walls of Team Approach Planning. His 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 supporting Brian’s charitable and mission activities, which include First Presbyterian children initiatives, mission work involving youth, The Door, Youth for Christ, Power to Change, supporting mission awareness, and local fundraising.

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.



Team Approach Planning is located at 450 Hume St. Unit # 4 in Collingwood
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