RHONA KONNELLY, C.L.U, EPC, CSA

Rhona Konnelly, an accomplished Insurance and Estate Planning Consultant has 28 years of diverse financial and estate planning experience. She has served for many years in senior Specialist and Directorship roles with many of Canada's leading financial services organizations, including Investors Group, Nesbitt Burns Financial Services Inc., Berkshire Insurance Services Inc., Canada Life Assurance Company, and Foresters.

Rhona earned her Chartered Life Underwriter's Degree (C.L.U.) in financial services and estate planning from the Canadian Association of Insurance and Financial Advisors (CAIFA) in 1998. In 2005, Rhona received the Elder Planning Counselor (EPC) designation through the Canadian Initiative for Elder Planning Studies and Certified Senior Advisor (CSA) designation through the Society of Certified Senior Advisors. Both credentials build on her in-depth experience and will assist her in advising elders and their families on both the financial and lifestyle (e.g. social and health issues) aspects of retirement.

Rhona is also a member of the faculty at Ashton College, a private post-secondary educational institution, where she teaches a variety of industry related programs. In her individual consulting practice, Rhona combines her advanced expertise on estate, insurance and tax planning to bring an unmatched strategic capability to the estate planning process. She also helps families to preserve their family's legacies, through educational seminars and personalized, strategic estate plan preparation and reviews.