JONATHAN **ROUNG**

Jonathan Roung believes one of the simplest ways to plan for your future is to tackle it one step at a time.

Developing financial plans and managing investments since 2004, this Investment Specialist and Financial Planner with Scotiabank has hands-on experience in navigating portfolios through both the good times and the bad.

He coordinates with his team of experts to offer retirement and estate planning, investment portfolio management, and cashflow and credit evaluation.

“I provide sound financial advice in a friendly and approachable manner, and I firmly believe that people deal with people that they like, trust, and respect,” adds Roung.

Accredited as a Certified Financial Planner (CFP) and Chartered Investment Manager (CIM), Roung will develop a plan designed to keep pace with your life.

“My clients trust me to guide them to financial success. I strive to genuinely understand what is important to each person I work with, and then develop a step-by-step plan to help realize those objectives. It really is a partnership-style approach. We meet regularly to review progress and make amendments as challenges are identified and as milestones are met,” he explains. “My clients’ lives are always changing, and I ensure that their financial plans are reflected accordingly.”

“There has been a lot of uncertainty in 2020, and now more than ever it’s more important to ensure that investors have a sound financial plan and a properly diversified portfolio. Market volatility and portfolio rebalancing should be the foundation of every financial planning discussion, with the investor’s risk tolerance clearly in mind. The financial plans that I develop are tailored to each individual, from those looking to aggressively save for the future, to those looking for consistent and reliable cashflow through retirement.”

Despite challenges imposed throughout 2020, Roung continues to be available for existing and new clients. “Much of our work can be done through telephone, e-mail, and video conferencing, which allows me to remain proactive in portfolio management even if we can’t meet face-to-face.”

Roung also serves as a Subject Matter Expert for the Canadian Securities Institute, developing and updating the exams required for new entrants into the financial industry to become accredited. He has also served as a Public Policy Ambassador with the Financial Planning Standards Council, which seeks to elevate the standards to which accredited financial planners are held in Canada.

With offices at 5795 Malden Rd in LaSalle and 1570 Huron Church Rd in Windsor, Roung is mobile and able to meet clients on their terms, whether at his office or their home or business. Invested in both the community and your financial future, he can be contacted by email at Jonathan.Roung@Scotiabank.com or by calling 519-819-1734.

What He’s Wearing:
Jacket: Soul of London
Shirt: Stefano Brunelli
Jeans: 34 Heritage
Shoes: Johnston & Murphy

Photo by Pat Scandale