

LOCAL COMPANY SEES SIGNIFICANT GROWTH

Wellington-Altus shadows clients' wishes when donating

Wellington-Altus's support of the EY Black Tie Bingo has seen it added to the Foundation's donor wall in the \$10,000-plus category.

Wellington-Altus is an independent private wealth management firm founded by Saskatoon-based Todd Degelman and a Winnipeg partner.

It's the second such venture for the two entrepreneurs who'd previously created a similar company called Wellington-West. "In 10 years we grew to over 40 offices and acquired more than \$10 billion in assets," Todd says. "We eventually sold to National Bank."

Because of that sales agreement, Todd and his partner were restricted to leave the bank for five years. "However, we still had that entrepreneurial spirit, so we negotiated with National Bank and started Wellington-Altus in 2017."

"It's been three years and we're rivaling what we did last time," he reports. "We now have approximately 20 offices across the country, 300 employees and over \$10 billion in assets."

Todd was also recently ranked #2 in the top 50 brokers in Canada by Wealth Professional magazine.

Todd says that the company name partially comes from the famous battle of Waterloo, where the Duke of Wellington defeated Napoleon with a small army. "It's like the David and Goliath story, which we relate to because we're a small brokerage firm competing with big banks."



Above: The Wellington-Altus team at the Saskatoon office. Below: Founder Todd Degelman.



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Way, the YMCA, Cosmo Industries, and the Leukemia & Lymphoma Society of Canada. "We try to spread it out. It's easy because I find my clients are so charitable. Usually we'll piggyback on their ideas and interests. I like that because I can help my clients but also help a charity at the same time. It's a win for everybody."

Wellington-Altus has sponsored the EY Black Tie Bingo since its founding. Todd's spouse, Lacy, also serves on the volunteer organizing committee. "We think it's one of the more fun events in Saskatoon so we're glad to help in a small way."

Todd's community involvement and support goes beyond the EY Black Tie Bingo, including supporting the United

The support for the hospital also aligns with this philosophy. "We have aging clients or clients with aging parents, so we see the need for the hospital and investing in technology. Ensuring that the hospital has the best creates a thriving community."

The Foundation thanks Wellington-Altus for its continued support. □