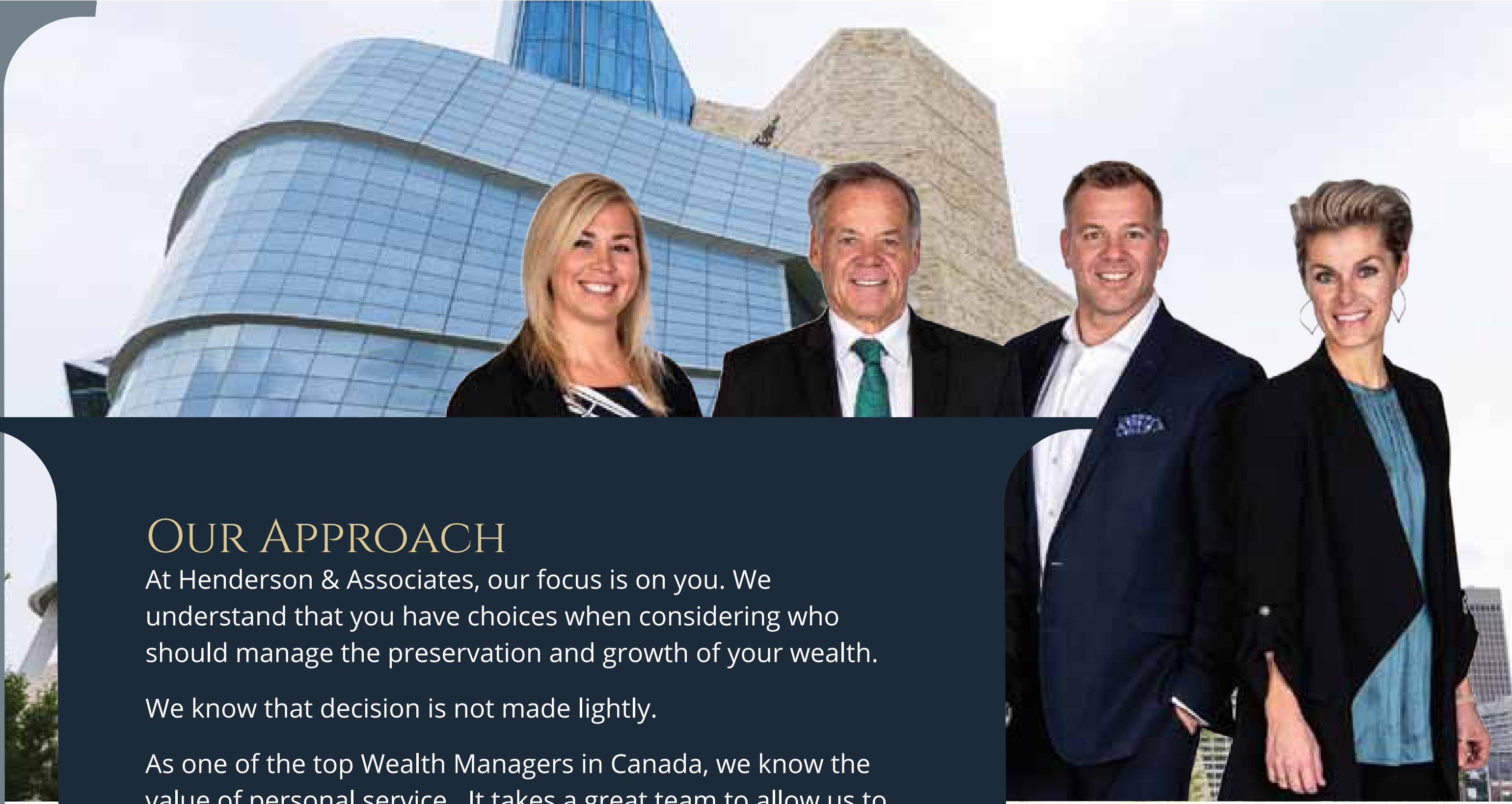
Henderson & Associates
Wealth Management

Wellington-Altus
Private Wealth

Prosper from our Passion



Our Approach

At Henderson & Associates, our focus is on you. We understand that you have choices when considering who should manage the preservation and growth of your wealth.

We know that decision is not made lightly.

As one of the top Wealth Managers in Canada, we know the value of personal service. It takes a great team to allow us to provide that personal touch to everything we do. From the initial phone call, to seamless transfers and documentation, our team is dedicated to your complete satisfaction. Experience what it is like to be treated like part of our family. We want you to prosper from our passion.

The Value of Advice

Many Canadians choose to shelter themselves from the most important financial decisions of their lives. Many studies have shown that those Canadians that have received advice from qualified/certified accredited Wealth Managers will outperform their sheltered counterparts. At Henderson & Associates, we leverage the very best minds and experts in the markets as well as other professional services to grow and protect your wealth.

HENDERSON
& Associates
WEALTH MANAGEMENT

PROSPER FROM OUR PASSION

THE VALUE OF COMMUNITY

Like you, we value the community that is so good to us. Our mandate is to give back in meaningful ways that will leave a legacy on your behalf. Our team is engaged in many volunteer activities that make a real difference in our community. Our ongoing funding projects include close business relationships with the United Way, and having a seat on the board of Rossbrook House.

OUR RESOURCES

Our team of Advisors, Associates and Administrators along with the resources of W/A Wealth Group engage both internal and external professionals to ensure that your Wealth Management needs are completely addressed. We work in concert with you to provide an exclusive service that is unmatched in the industry.

advisor.wellington-altus.ca/hendersonandassociates

ABOUT THE HENDERSON TEAM

PROSPER FROM OUR PASSION

RYAN HENDERSON FCSI®, PFP®, FMA, CIM®, DMS, FEA

SENIOR WEALTH ADVISOR & SENIOR PORTFOLIO MANAGER,

RYAN.HENDERSON@WPRIVATE.CA TEL: 431-813-8612

Ryan Henderson began his career in private wealth management in 2003. After building his own successful business, Ryan joined Bruce in 2008. Ryan is now the Managing Partner of Henderson & Associates, is responsible for all high-level operations and partners with Bruce in all investment decisions in the discretionary portfolios. He is also responsible for the long-term vision and strategic planning for the team. Ryan proudly has a well-established presence in many rural communities in Manitoba and is well-versed in agricultural business. Ryan and his team have also had extensive experience working with multiple, large institutional clients including both publicly traded and private corporations as well as formal endowment funds. Ryan was a member of his previous firm's Chairman's Council for the last 5 consecutive years before joining Wellington-Altus which recognized its top advisors in the country. Since our arrival in late 2020, Henderson & Associates has quickly risen up in the ranks at Wellington-Altus, proudly already achieving one of the 'top-ten' positions in the firm and continuing to grow.

Ryan holds the following industry designations: Chartered Investment Manager (CIM®), Financial Management Advisor (FMA), Professional Financial Planner (PFP®), Fellow of the Canadian Securities Institute (FCSI) and Derivatives Market Specialist (DMS). He believes in life-long learning and is dedicated to constantly expanding his financial and investment planning expertise through education. He has recently completed the FEA (Family Enterprise Advisor) program which will be a unique and valuable addition to our team's ability to better support multi-generational family businesses, high net worth and ultra-high net worth families. Ryan is a firm believer in having an entrepreneurial spirit in business and is a member of the firm's Advisory Board, helping to craft policy and strategy for the firm and its rapidly growing number of advisors.

Ryan enjoys being involved in his community including having previously served as a co-chair on the United Way Cabinet. Ryan and his wife Andrea have a young son, Oliver, and live just outside of Winnipeg. In his spare time, Ryan can be found staying very active by enjoying the outdoors on their country property as well as at their family cabin.

BRUCE HENDERSON MBA,CIM®, FCSI

SENIOR INVESTMENT ADVISOR & SENIOR PORTFOLIO MANAGER

BRUCE.HENDERSON@WPRIVATE.CA TEL: 431-813-8611

With four decades in the investment industry, Bruce is the founding partner of Henderson & Associates. His prudent and insightful portfolio expertise and management serve as the cornerstone of the H & A discretionary investment models. His exemplary dedication to his clients over many decades continues with Henderson & Associates' trusted relationships with clients held in the highest regard. In addition to his depth of market knowledge and experience, Bruce was a long-standing member of his previous firm's Chairman's council for 24 consecutive years before joining Wellington-Altus which recognized its top advisors in the country. Bruce has spent many years working as a Senior Wealth Advisor and Senior Portfolio Manager and he continues to help provide long term vision and strategic planning for the team.

Bruce earned a Bachelor of Arts Degree (Economics) from the University of Winnipeg and subsequently a Masters of Business Administration Degree (Finance) from the University of Manitoba. Bruce's community involvement includes recently serving on the Manitoba Club membership committee and currently serving as a member of the IIROC national hearing committee. Bruce also spends much of his time very proudly siting on the Board of the Rossbrook House, which is a part of his family legacy. In his free time, he enjoys being social, staying active and spending much time travelling and enjoying the family cottage in Victoria Beach.

ANDREA HENDERSON

SENIOR ASSOCIATE WEALTH ADVISOR

ANDREA.HENDERSON@WPRIVATE.CA TEL: 431-813-8616

Andrea has been in the Financial Services for close to twenty years; after gaining extensive experience in several different capacities, she joined Henderson & Associates in 2014. Now working closely with Bruce and Ryan, Andrea provides Wealth Management and Wealth Advisory support helping to manage client relationships. She has a dynamic approach to maintaining the Henderson & Associates values, keenly focused on exceeding client expectations with sincere empathy, efficiency and a pragmatic sense of humor! Her deep understanding of the many challenges of running an expanding family enterprise proves helpful when working with many of our clients. She is able to put her years of experience to good work on the facilitation of all investment portfolios from simple to complex for many of our high net worth, ultra-high net worth and institutional clients. Andrea also works hard in the background, involved in strategic planning for the team as well as being key in running the discretionary portfolio trading software platform.

In addition to attending the University of Winnipeg and being a graduate of Red River College, Andrea has completed a number of courses through the Canadian Securities Institute, including the Canadian Securities Course and the Wealth Management Essentials course. She also completed an industry-leading training program to become a licensed Associate Wealth Advisor. Outside of work, Andrea spends time with her husband Ryan Henderson and their young son, Oliver. An experienced horseback rider, Andrea always loves to be outdoors. She enjoys spending time with their family, two bulldogs, travelling and staying active.

JACQUELENE YAKUBICKA

ASSOCIATE

JACQUELENE.YAKUBICKA@WPRIVATE.CA TEL: 431-813-8618

Jacque started in the Financial Services industry in 2006 and joined Henderson & Associates in 2015. Anyone who knows her immediately understands that Jacque has remarkable creative and organizational skills as well as a charming and lively approach to client service and nurturing client relationships. She quickly took on the role of running our Administrative team and continues to provide our clients with exceptional service and care. It is with careful, persistent effort and focus that she keeps our team well organized and running smoothly all while making it look effortless and having fun!

In her free time, Jacque enjoys spending time with her husband Ryan and their two young children, Lexi and Logan at their home outside of the city. Whether in their pool, gardening or out driving their quads, Jacque can often be found outside staying active with their kids, surrounded by extended family and friends.