

secrets and lives — **AND THE 7 SINS**
with **MARK BISHOP**

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hen Mark Bishop was growing up in the Okanagan, his parents kept him and his siblings busy with various activities, like ski racing, soccer, rugby, football and water skiing.

Now, the Kelowna-based senior wealth advisor and portfolio manager is taking a similar approach with his own four kids, who range in age from 10 to 16; they take part in everything from ice hockey and field hockey to soccer and skiing.

“My parents wanted to run us like border collies,” Mark says with a laugh, “which is what we do with our kids—we keep them busy, keep them out of trouble. I feel very fortunate to live where I do and I appreciate all of this.”

Mark was born in Victoria and lived in Dawson Creek before his family moved to Kelowna prior to elementary school. After finishing high school, he played with the Okanagan Sun football team for a few years, and then began working on an assembly line at a trucking company. That’s when he decided he was ready for more, so he applied to the University of Victoria, where he earned a bachelor’s degree with a major in economics and a minor in business.

His first job post-graduation was that of a bank teller, and Mark worked his way up to account management, handling mortgages, loans and investments for high-value households. It didn’t take long for him to realize his true passion was investment advising and he gained experience at a few bank-owned firms before joining Wellington-Altus Private Wealth, an award-winning independent company, three years ago.

During his time in the industry, Mark has earned a reputation for building long-lasting relationships and providing tailored investment solutions for his clients. A certified financial planner, he also holds the chartered investment manager designation, one of the highest levels of certification in the investment industry, underlining his advanced skills in portfolio management and discretionary investment authority.

Mark is also a licensed insurance advisor, enabling him to offer comprehensive financial and risk management solutions.

What he values most about his work is the people.

“I enjoy the long-term relationships,” Mark says. “I like helping people and putting them at ease about their finances. That’s what most of my clients want—somebody to take care of their wealth. And I like doing that for them, taking care of their investments and financial planning. The best part is being able to put them at ease. It’s nice to be that person. Most of the people I work with are more than just clients; they’re friends.”

When he’s not working or running his kids around to their various activities, Mark can be found skiing, golfing, hiking, mountain-biking and swimming in Okanagan Lake.

“It’s all right at our doorstep,” Mark says. “We’re pretty fortunate.”

“The 7 Sins

ENVY:

Whose shoes would you like to walk in?

That’s a tough one. I’d say the late Gord Downie (lead singer of the Tragically Hip). He was a great Canadian poet, philanthropist and singer. He was a unique individual and had an amazing voice!

GLUTTONY:

What is the food you could eat over and over again?

I have a sweet tooth. I am the cookie monster. I may not eat like him but I love cookie(s).

GREED:

You’re given \$1 million that you have to spend selfishly. What would you spend it on?

I’d get some big boy toys: boat, ATV, and motorcycle(s). If there was anything left, I’d travel. I’d go to space.

WRATH:

Pet peeves?

I just read this and happen to agree: Paying too much tax; paying taxes on the money you make; paying taxes on the money you spend. And paying taxes on the things you own that you already paid taxes on with already-taxed money.

SLOTH:

Where would you spend a long time doing nothing?

Hah, I’ve done it in my late 20s. On the beach with a bevvy. Get hot in the sun, jump in water to cool off. Repeat.

PRIDE:

What is the one thing you’re secretly proud of?

My parents instilled in us the value of modesty from an early age, so I don’t often talk about how proud I am of my family. As a father, son and husband, I can’t help but feel an immense sense of pride when I think about everything they have achieved and the people they have grown into. Whether it’s their personal accomplishments, their dedication to helping others, or the way they carry themselves, I couldn’t be prouder of the individuals they’ve become. I’m also proud of my ability to maintain a healthy balance between work and life, ensuring that neither one overshadows the other. I believe in working hard and playing hard, finding fulfillment in both my professional achievements and the time I spend enjoying life with my family and pursuing my passions. This balance keeps me energized, focused, and grounded.

LUST:

What makes your heart beat faster?

In addition to my wife, Kendra—she is basically the CEO of the family and really holds the unit together—I love acceleration, the feeling of taking off in a jet or a fast vehicle. The drop in a roller coaster. That gets my ticker pumping. **B**”