Cindy D. David, CFP, CLU, FEA, TEP

Senior Estate Planning Advisor, Raymond James Financial Planning Ltd.

With 20 years of financial planning expertise, Cindy David, CFP, CLU, FEA, TEP is the President of Cindy David Financial Group Ltd., which consults to larger national firms such as Raymond James Ltd., in Vancouver, British Columbia. In the fall of 2009, David co-authored the timely book encapsulating the deepest economic downturn the globe has seen in decades: Financial First Aid for Canadian Investors: Stop the Bleeding, Start the Healing and Get Your Portfolio on the Road to Recovery. The book holds the distinction of being one of the Top 5 financial books of 2009, according to Canada's Money Sense Magazine. She has also penned a number of financial pieces for a variety of respected publications.

Cindy David is a well-known expert in the Canadian insurance industry. A commemorative "Award of Excellence" was presented to her in 2008 by Canada's largest financial institution, Manulife Financial, for being one of the top three estate planners across the country. According to Manulife, Cindy is the youngest individual to have achieved this distinction. Cindy was also part of a special report called Women of Influence in Canada's Life Insurance Industry, featured in the August 2014 issue of The Insurance and Investment Journal.

She works with many business owners in BC and retired or retiring clients. Cindy provides her tax-effective solutions and expertise and tailors customized, personal financial planning services to meet the life goals of each client. An accomplished speaker, she is often asked to be a member of industry panel discussions and most recently spoke at the Conference for Advanced Life Underwriters in Ottawa in May 2014.

CFP – Certified Financial Planner, licensed through the Canadian Institute of Financial Planning
CLU – Chartered Life Underwriter, licensed through the Canadian Institute of Charted Life Underwriters
FEA – Family Enterprise Advisor, licensed through the Institute of Family Enterprise Advisors
TEP – Trust and Estate Practitioner, licensed through the Society of Trust & Estate Practitioners