OUR TEAM

KATHERINE PARSONS, CFP®
SENIOR WEALTH ADVISOR, *iA Private Wealth Inc.*
INSURANCE ADVISOR, iA Private Wealth Insurance*
519-746-8448 Ext. 213 I katherine@parsonsfg.com

Katherine joined the advisory team at iA Private Wealth in 2005, working alongside partners, Joe and Greg. With their mentorship and guidance, she has grown her business and has assumed their practice as they transition into retirement. As a CERTIFIED FINANCIAL PLANNER® professional and graduate of Bachelor of Business Administration at Wilfrid Laurier University, Katherine provides comprehensive financial planning solutions to families and small business owners. Katherine strongly believes in developing a business that not only provides direction and value to her clients, but also remains connected and gives back to the community. Katherine is a proud mother of two young daughters, Stella and Norah. She and her husband Brenden have a passion for cooking and love spending time skiing as a family.

CHRISTINE FARNHAM, QAFP®
ASSOCIATE WEALTH ADVISOR, *iA Private Wealth Inc.*
519-746-8448 Ext. 210 I christine@parsonsfg.com

Christine is Katherine's right-hand Associate, and you can reach out to her for anything concerning your accounts. She is a fully IIROC® licensed professional as well as holding the Financial Planning designation, QUALIFIED ASSOCIATE FINANCIAL PLANNER®. In the office, her responsibility lies in creating Financial Plans using our comprehensive financial planning software. She collaborates with clients to develop optimal scenarios, addressing goals such as saving for a house or securing a desired retirement cashflow. She brings valuable expertise to our team and enjoys the dynamic nature of the financial industry. Outside of work, Christine enjoys spending time with her family and setting out on new travel adventures with her husband Dave.

MAYA VOGEL
ADMINISTRATIVE ASSISTANT, *iA Private Wealth Inc.*
519-746-8448 Ext. 204 I maya@parsonsfg.com

Maya joined our team in May of 2022. Maya has graduated with an Honours Bachelor's degree in Business Administration. Within the team, Maya's role focuses on providing client's assistance with their day-to-day needs. She prepares client meeting documentations, processes transactions, and facilitates client communication. Outside of the office, she is an avid traveler, reader, and enjoys spending time with her friends and family.

GIOVANNA GRACI
ADMINISTRATIVE ASSISTANT, *iA Private Wealth Inc*.
519-746-8448 Ext. 202 I giovanna@parsonsfg.com

Giovanna is primarily responsible for providing administrative support to our team. She coordinates client meetings, performs administrative tasks, processes transfers, assists in the estate settlement process, and follows up on account transactions. Giovanna joined our team in October of 2022. She completed her Bachelor of Business Administration – International Business Management degree. Giovanna loves to spend time with loved ones and travelling. So far, she has travelled to 7 countries and hopes to be able to continue to see the world, one place at a time.

Parsons FINANCIAL GROUP iA Private Wealth™

OUR HISTORY

JOE HAGERMAN & GREG BENCINA | CO-FOUNDERS

Joe and Greg were Senior Financial Advisors of our Waterloo office. They have been successful business partners since 1992 and have formed a long lasting friendship along the way. Building strong relationships and surrounding themselves with motivated individuals has been paramount in their success. Developing a long -term strategy to maintain client relationships into the future has always been a key focus of the business. Succession planning for the partners began in 2005 with the introduction of Katherine Parsons to the team. As Joe and Greg begin to transition into retirement the team's goal is to provide the same level of care and guidance that they have extended to their clients over the years.

OUR EXTERNAL PROFESSIONALS

MATT STRAUSS
INSURANCE ADVISOR

JILL MELANSON
MORTGAGE AGENT

ZERBROSKI & ASSOCIATES
CHARTERED PROFESSIONAL ACCOUNTANTS

WARREN GRIFFIN
ESTATE SPECIALIST & NOTARY PUBLIC

TYLER HORTIE
ESTATE, CORPORATE & REAL ESTATE LAW