

About The Blogger

Welcome to my blog,

In brief, I have a Bachelor of Commerce degree (1987) and hold professional designations as a Canadian Chartered Accountant (1990), a Chartered Financial Analyst (1999) and a Certified Financial Planner (2007). I have worked in a variety of interesting locations including; Calgary, Canada, the Cayman Islands, The Bahamas and Zurich, Switzerland. For the better portion of 10 years, I worked in the Wealth Planning unit of UBS Ag, focusing on the international fiduciary business. Today, I reside in Western Canada where I run Wilson Wealth Management, providing financial advisory services for high net worth individuals and businesses.

I decided to start this blog due to my nephew and his friends. He is studying Commerce in university. While he seems to be learning a lot about elasticity of demand (and other fun subjects), he is not learning the practical tools needed to enter the business world, maneuver through the corporate minefields and begin to accumulate wealth to pay down debts, buy a house and begin to invest for retirement. It appears university has not changed much since I graduated over 20 years ago.

The objective of this blog is to comment on personal wealth management issues that affect those entering the business world. Too often, wealth advice simply focuses on investing cash into equities, fixed income assets, real estate and so on. However, for most young people the difficult part is actually accumulating the funds necessary to start investing. A significant portion of this blog will focus on areas where I believe young adults starting out in the work world can improve themselves as a means to a successful end. This may be through education, developing smarter work habits, managing costs more effectively, etc. In short, practical advice that you can use to begin building wealth for investing.

A second part of this blog will look at basic investment concepts and traditional investment options. This will not be too detailed as I do not believe that the average person has the time or technical tools to properly select specific stocks or bonds. The focus will be on understanding core investment principles and why they are important to the investment process. From there, I will outline various ways to create diversified, cost effective and (hopefully) well performing investment portfolios.

I shall try and stick to the basics in this blog. Should you wish to read an occasional more in-depth analysis on investment related topics, please visit my business website, [Wilson Wealth Management](#).

I hope you will enjoy this blog, be able to learn a point or two that helps in your career progression and I wish you all the best as you seek success in your goals.

Your humble blogger,

Jordan M. Wilson