Review of Perron & Partners Wealth Management – A Top-Rated Wealth Management Firm

Overview: Perron & Partners Wealth Management

Perron & Partners Wealth Management was recently ranked by AdvisoryHQ News as a top-rated wealth management firm in Calgary, Canada.

The report below provides a top-down review and comprehensive details on the factors that enabled this firm to be ranked as one of the top wealth management firms in Calgary.

Intro: About AdvisoryHQ News

AdvisoryHQ News is a fast-growing global online news media that provides extensive research, reviews, and rankings of firms and products.

Searching for top-rated firms, services, and products can be a daunting undertaking for a consumer, especially if that consumer is unfamiliar with the landscape. AdvisoryHQ is committed to *simplifying the research that consumers conduct before choosing a top provider, firm, service, or product.*

Our review and ranking articles are always 100% independently researched and written. Firms do not pay for their ranking. In fact, most firms do not even realize that they are being reviewed by AdvisoryHQ until after our reviews have been completed and published to the public.

For additional information on AdvisoryHQ's methodologies, click here: AdvisoryHQ Methodologies. For information on AdvisoryHQ's objectivity approach, click here: AdvisoryHQ's Objective Process.

Overview of Perron & Partners Wealth Management

Perron & Partners Wealth Management is a financial advisor in Calgary founded by Gary Perron in 2013.

With over 100 years of collective experience, the firm offers independent, unbiased financial advice to both individuals and institutions within the Calgary community.

Our review was unable to confirm whether Perron & Partners is a fee-only or fee-based firm. As always, we recommend verifying compensation structure before partnering with any Calgary financial advisor.

Key Factors That Enabled Perron & Partners Wealth Management to Rank as One of the Top Wealth Management Firms in Calgary

Planning Process

Perron and Partners seeks to provide common sense advice without unnecessary complications. Advisors use a four-step process with each client:

Shared Understanding

During the first meeting, your Calgary financial advisor will learn your unique needs and expectations. They will also explain Perron's investment strategy and processes.

Developing an Investment Plan

Once advisors have learned about the current state of your financials, expectations, and tolerance for risk, they will begin the process of putting together your investment strategy.

Review and Forward Thinking

After the beginning stages of your relationship have solidified, Perron advisors will begin to educate you about the investment process. You'll have the chance to ask any questions regarding investment decisions, implementation, and goals.

<u>90-Day Principle</u>

Once you give the green light, your Calgary financial advisor will take action and put the investment plan into play within 90 days.

The relationship doesn't end once investment decisions have been made and the portfolio established, though. Going forward, you will receive updates from a relationship manager at least every 90 days.

Unique Opportunities

Perron, one of Calgary's top financial advisor firms, outlines the following unique opportunities available to their clients:

- Truly customized and independent advice
- Better value through the delivery of tax and cost control initiatives
- The ability to invest without limits on selection, research or personalization
- Clients benefit from multiple sources of ideas
- Guidance is simple to guide clients through complex life situations
- Risk-adjusted returns ensure clients can stay protected from unnecessary risk
- When you try to contact Perron you'll always get a response
- There are a variety of educational resources available to clients including conference calls and newsletters

As an additional benefit, Perron has recently expanded their wealth management services, represented by the graph below.

Perron & Partners Wealth Management – Calgary

Rating Summary

Perron is a fully independent Calgary financial advisory, and they define that independence as one of their biggest opportunities. They have a large platform, and are not held back by corporate directives, sanctions, or limited by in-house resources.

This independence, combined with expert solutions for retirement, risk management, investments, and family wealth management makes Perron & Partners one of the best wealth management firms in Calgary to consider partnering with this year.

Article Link:

https://www.advisoryhq.com/articles/top-advisors-in-calgary/#Perron-Partners-Review

Contact Us

Contact us for questions and comments about this review article: AdvisoryHQ News.