

# Gregory Stanley CFP AMP

President & CEO

866.658.0492 Ext.100

gregstanley@homenwork.com

## Licensing

Licensed under the Mortgage Brokers Act to act as a sub mortgage broker. Extensive background in finance, insurance and investment products. Certificate in financial planning by The Canadian Institute of Financial Planning and awarded the designation of Chartered Financial Planner. Awarded by the Financial Planners Standards Council of Canada to be licensed as a Certified Financial Planner. Certificate from The Faculty of Commerce and Business Administration of UBC and the Real Estate Council of BC as a real estate salesman and sub-mortgage broker and through The British Columbia Real Estate Association completed the 'Applied Real Estate' course. A member of the Mortgage Brokers Association of BC.

Over 25 years in business. A licensed Certified Financial Planner able to create estate, retirement, and financial plans for clients. Uses mortgage products to consolidate and refinance current debt financing.

Managing Director of Home n Work Mortgages Inc. - a national Canadian mortgage brokerage company - from Coast to Coast. Home n Work Mortgages is a leader in residential (home) and commercial (work) financing. It is the first mortgage brokerage company to introduce the 'Smart Equity' mortgage software package to the Canadian mortgage marketplace. It combines expert mortgage advice, best mortgage product selection with mortgage reduction (and wealth accumulation) software.

## Special Marketing

Television Appearances - guest of the Daily Edition Chek 6 program on insurance and estate planning; Rogers Cable on taxation & insurance.

Radio guest on CKDA on insurance matters.

Contributing writer for the MONEY column Elder Statesman, Today's Times, Times-Colonist; Calgary Herald, Saanich News & Island Parent Magazine.

Seminar Work - have given numerous seminars to large groups of people.

## Communication Skills

Effective communication training, listening to and understanding a customer's needs, effective writing skills, extensive advertising & promotion marketing, customer relations & seminar work; able to work with 'young' and 'aging' client base and discussing special needs and concerns in retirement income planning; debt consolidation, mortgage financing and able to discuss needs on the family level.

## Strong Knowledge Background

Empathy for client's viewpoints on financial health concerns, money matters, investments, mortgages, travel, flying (private pilot), sailing & cruising, scuba diving, construction & design, artwork, networking, charities, people skills.

## Demonstrated Skills and Abilities

- Able to function effectively in busy environment
- Experience dealing with all forms of cliental
- Patient and sensitive toward others
- Recognized as friendly and empathetic
- Work well independently and as a team member
- Excellent work habits and attitude

## Hobbies and Personal Interests

Single father. Enjoys the challenge of being a supportive and nurturing parent.

An avid sailor for the past 13 years, sailing throughout the Pacific North West from Seattle to Desolation Sound, British Columbia, with his sailboat called 'Dreamer'.

Since 1992, when he earned his private pilot's licence he has been flying throughout Canada and the United States, while being a member of the Victoria Flying Club - a club whose members own over a dozen aircraft that we can use anytime.

Director of the Cordova Bay Association - a group responsible for reviewing subdivision, zoning, and other community issues affecting the public in municipality of Saanich in the prestigious Cordova Bay region.

He enjoys instructing other mortgage brokers with the knowledge he has learned over his extensive years in the financial services industry.



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