

Adam McHenry Helps Local Port Credit Families Take Their Wealth to the Next Level

By Eileen Hoftzyer



Every family is different, and they each have their own financial situations and goals. That's why Adam McHenry, a Financial Advisor, looks at each of his clients individually and provides tailored solutions based on their unique situations.

"There's never a 'typical' family or situation, and my team and I can help our clients at any stage of life," Adam says. "We can provide families with advice based on our developed professional judgement and experience in order to help them create a plan specific to their situation."

As a Financial Advisor with Manulife Securities Incorporated, Adam and his team offer their clients the best of both worlds: independent, unbiased advice to clients and access to Manulife's resources and financial strength. Adam and his business partner, Brett Langill, opened their financial advisory partnership, after Adam had spent several years working for the big bank investment firms on Bay Street.

Adam is a Chartered Financial Analyst, a globally recognized credential for Investment Managers. Adam is also a discretionary portfolio manager, a legal designation that recognizes Adam as a fiduciary for his clients, which means that Adam is responsible for a higher standard of care to his client's than a typical bank broker or financial planner would be subject to, in the eyes of the courts.

Adam and his team of four professionals offer a variety of services to their clients, including investments, insurance, estate planning as well as group benefit and retirement plans for business owners and their employees. Adam takes a holistic view of a family's wealth, making sure that all of the different elements work together to create

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a customized plan that both achieves their financial goals, while lowering taxes and costs.

"We view ourselves as a total financial advisor," Adam says. "We have access to a wide variety of resources, and we provide comprehensive service to our clients. No matter the question, I want our clients to know that they can ask for help on anything financial or non-financial. I want them to know that we have their best interests at heart and will provide an opinion whether it is related to finances or something like a restaurant recommendation to take their family and friends out to eat at."

Adam's previous experience working for large firms on Bay Street has given him valuable experience managing complicated financial situations. "I was exposed to many complex cases during my time there," he says. "Now I'm trying to help local families access that experience and insight." Where other advisors may be intimidated by complex situations and needs, Adam enjoys sinking his teeth into a financial challenge. "Complexity is not attractive to many advisors, but I can use my experience and knowledge to create a plan that can save a family a significant amount of money," he says. "I get tremendous value out of that, because that savings goes right into that family's pocket."


As a resident of Mineola and with a young family of his own, Adam is focused on helping other local families successfully manage their finances in order to achieve their goals.

"I think the greatest thing for me is creating peace of mind for a family," Adam states. "Families are trusting me to work hard for them to create wealth and ensure that they are looked after, no matter the situation. The best feeling I have is the relief I see on a client's face when they realize that their family's financial well-being is being taken care of and they don't have to constantly check in on their representative, because they are receiving customized and proactive service they expect and deserve."

Adam McHenry, CFA, Manulife Securities Incorporated is located at 300 The East Mall, Suite 306. For more information, visit www.adammchenry.com or call 416-901-6500.


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Adam is a resident of Mineola



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