



GARDNER BROWN
CONSULTING INC.

Financial Literacy for a Better Life

DOREEN GARDNER BROWN, BHEc CFP AFC

Doreen Gardner Brown is principal and owner of Gardner Brown Consulting Inc., specializing in financial counselling and education. Doreen is a Certified Financial Planner, an Accredited Financial Counsellor and a personal finance educator who creates opportunities for people to learn the skills needed to make effective decisions about resources.

Financial literacy for a better life is the guiding principle for all of Doreen's business and professional activity. There are four themes in her practice - collaborative financial consulting & divorce financial planning, personal financial management, training other professionals and retirement planning.

COLLABORATIVE FINANCIAL CONSULTING & DIVORCE FINANCIAL PLANNING

Neutral financial counselling engagements for clients that are separating.

Financial analysis for individual clients of lawyers and mediators.

Trainer and mentor for other collaborative professionals.

PERSONAL FINANCIAL MANAGEMENT

Design and delivery of courses, Lunch and Learns and workshops.

Individual financial counselling for clients from diverse backgrounds, including severance engagements.

Experience Highlights:

- provides **financial counselling services** to Employee and Family Assistance Programs and Career Management firms.
- presented educational sessions in the workplace - **Severance Financial Planning, Cash Flow & Debt Management, RRSP Planning and Personal Finance** for employees of corporate clients.
- developed a home study course, **Mind Your Money**, on personal finances.
- presented sessions on **Severance Planning, Debt Management, RRSP Planning and Personal Finance** to British Columbia corporate clients for their employees.
- designed and presented **Gaining Control of your Finances** seminar and individual consultation program for terminated government employees.
- presented **Understanding RRSPs, Off-farm Investments, and Family Living Costs** seminars in rural communities.

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903 – 2050 Nelson Street, Vancouver, British Columbia, Canada V6G 1N6



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TRAINING PROFESSIONALS

Trains other collaborative professionals (lawyers, financial and mental health professionals) on *interdisciplinary collaborative practice* with their clients.

Designed and presented *customized training program* for the Credit Counselling Society on Solution Focused Financial Counselling, with Ruth E Berry PhD.

Mentors other professionals in financial counselling and collaborative practice techniques.

Experience Highlights:

- designed the *financial component of the interdisciplinary collaborative practice training* course for the Continuing Legal Education Society of British Columbia and presented it to professionals in Canada and the US with Nancy Cameron QC and Susan Gamache PhD and in Scotland and England with Lisa Alexander LLB and Yuval Berger MSW.
- designed and implemented a *financial advice in-house training program for Branch Managers and Financial Advisors* in a major credit union in British Columbia.
- *initiated use of* The Canadian Institute of Financial Planning *CFP™ program* in British Columbia universities and colleges.
- instructed all six *Canadian Institute of Financial Planning CFP courses* at Simon Fraser University and Capilano University.
- *prepared Branch Managers and Financial Advisors* from a variety of financial institutions *to write the CFP proficiency exam*.
- reviewed the *Insolvency Counsellor's Qualification course* offered by the National Insolvency Qualification Program for Bankruptcy Trustees and Credit Counsellors and recommended modifications (2002).
- guest Lecturer at University of British Columbia and Capilano University in *Law, Social Work and Family Studies, Education and Business faculties*.

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RETIREMENT PLANNING

Custom design and presentation of workshops and seminars for groups.

Individual retirement planning consultations for clients.

Experience Highlights:

- co-designed and co-presented **Financial Planning Seminars** to BC Government employees affected by workforce reductions.
- co-produced and co-presented **Pre-retirement Financial Planning seminars** to federal government employees.
- presented tailored **retirement planning seminars in the workplace** for members of group retirement and pension plans on behalf of a major life insurance company.
- facilitated and implemented a succession planning project for Manitoba farm families - **Strategies for your Family Farm Transfer**.
- created and presented workshops on **Retirement Needs** and provided **individual consultation on retirement income projections** for the Family Farm Transfer Project.
- developed **Making Financial Decisions Workshop** for Creative Retirement Pilot Project for older employees facing unplanned early retirement.
- generated and delivered **Planning for Retirement: Building your Financial Security Seminar** for a Government Employees Union Pension Committee's members and staff.
- presented **Women, Money & Retirement: Investing in Yourself** seminar.

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PROFESSIONAL AFFILIATIONS

- Association for Financial Counselling & Planning (AFCPE) - Member & Presenter at conference
- Association of Divorce Financial Planners (ADFP) - Member & former Board Director
- Canadian Association of Financial Planners - former Director National Board & Manitoba Chapter
- Canadian Home Economics Foundation - former Trustee
- Canadian Institute of Financial Planners (CIFPs) - Member & Presenter at conference
- Collaborative Divorce Association of Vancouver - Member & former Co-chair of practice group
- Community Financial Counselling Service - former Vice Chair and Director
- Financial Planning Standards Council - current CFP licensee
- International Academy of Collaborative Professionals (IACP) - Member & Presenter at conference

EDUCATION

Ongoing development with completion of annual continuing education credits through conference and seminar participation and by organizing professional development events.

- Accredited Financial Counsellor, AFCPE (2007)
- Solution Focused Financial Coaching - Fred Waddell, PhD (2005)
- Elder Planning Counsellor course (2004)
- Continuing Legal Education of British Columbia (CLE) - Family Law Mediation (2002)
- Continuing Legal Education of BC - Interdisciplinary Collaborative Practice training (2002)
- Financial Planning Standards Council of Canada - Certified Financial Planner (1997)
- Investment Funds of Canada - Branch Managers Course (1996)
- Canadian Securities Course (1995-96)
- Canadian Institute of Financial Planning - Chartered Financial Planner (1990)
- University of Manitoba - Bachelor of Home Economics (1970)

CAREER SUMMARY

1997 - Present **Gardner Brown Consulting Inc.**, Private Practice - Vancouver
1996 - 1997 Royal Bank - Management Training Program - Vancouver
1990 - 1996 **Gardner Brown & Associates**, Private Practice - Winnipeg
1980 - 1994 **Family Finance Specialist** for the **Province of Manitoba**, Manitoba Agriculture
1970 - 1980 **Community-based Extension Home Economist**, Provincial Governments in
Manitoba and Prince Edward Island