

# Local means expert financial advice for everyone in the community.

**At Prospera, we work for you. As a cooperative, we measure our success by the prosperity of our members, and we always put people – not dollars – first.**

When you choose us, you benefit from:

- Local knowledge and insights
- Service with integrity
- Innovative and creative thinking
- Commitment to accountability
- A team of specialized experts



[charlene.wallis@prospera.ca](mailto:charlene.wallis@prospera.ca)  
M: 604.549.2642

## Meet Charlene Wallis CFP

**Investment Advisor**  
Prospera Insurance Agencies Ltd.

**Investment Advisor**  
Credential Securities

Charlene works closely with our members to build savings for all kinds of wealth objectives:

- Planning for Retirement
- Saving for Children's Education
- Investment Strategies
- Risk Management
- Estate and Legacy Planning
- Generating Regular Income
- Managing Debt

Charlene has more than 35 years of experience in the financial industry and is a Certified Financial Planner (CFP). Friendly and consistent, she is committed to understanding members' priorities for their money and their lives. Then she draws on her expertise to build solid plans based on members' specific financial needs and goals.

Building strong relationships enables Charlene to create solid plans and help members see them through. She has an ability to connect with senior members and is aware that they have different financial and investment needs. **Charlene works with members to explore their options and help them achieve their dreams.**

Know your Advisor:  
IIROC *AdvisorReport*

**Credential**  
Securities

Mutual funds, other securities and securities related financial planning services are offered through Credential Securities, a division of Credential Qtrade Securities Inc. Credential Securities is a registered mark owned by Aviso Wealth Inc. Prospera Insurance Agencies Ltd. provides life, disability, and critical illness insurance, annuities, and full business solutions such as group benefit plans, succession planning, and business owner insurance.