

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



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Meet Mark Hepplewhite CFP, CLU, CIM

**Investment Advisor,
Senior Wealth Consultant**
Prospera Insurance Agencies Ltd.

**Investment Advisor,
Senior Wealth Consultant**
Aviso Wealth

Mark 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

Mark has more than 18 years of experience in financial services and is a Certified Financial Planner (CFP), Chartered Life Underwriter (CLU), and Chartered Investment Manager (CIM). He is an Investment Advisor with Credential Securities and a Life Insurance Agent through Prospera Insurance Agencies. Mark's expertise and deep understanding of financial markets, allow him to offer a sense of calm to members even in times of uncertainty.

Mark prides himself on being a compassionate and consistent resource to members, helping them understand their financial lives in way they can relate to. Regular meetings ensure member's plans are adjusted if circumstances change. **Mark's extensive experience in both investment and insurance solutions helps members achieve a balance of income, growth, protection, and tax-efficiency.**

Know your Advisor:
[CIRI Advisor Report](#)

Mutual funds and other securities are offered through Aviso Wealth, a division of Aviso Financial 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.