RAYMOND JAMES®

Retirement Sherpa

Retirement Sherpa Team - Let us be your GUIDE
115-980 Fraser Dr., Burlington, ON. L7L 5P5 - retirementsherpa.ca - 905-634-3366 - 1.866.752.6829

Who we are... Your Sherpa

Tim Niblett
CFP, CIM, CHFS
Portfolio Manager

Since 1992, Tim has dedicated himself and his practice to continuous personal and professional growth within the financial services industry. Tim's respected industry experience and his combination of professional designations are matched by few advisors in Canada. Through Raymond James (USA) Ltd., Tim is licensed in the U.S. and able to offer cross-border solutions for clients in Canada and the U.S.

Your Retirement Sherpa Family is led by Portfolio Manager, Tim Niblett. Tim has organized a team of specialists who create, monitor, and adjust tax advantaged investment, insurance and mortgage solutions for our valued clients.

He is also fully insurance-licensed and able to help his valued clients determine what best fits into their wealth management plans. Tim might spend a little bit too much time following the Florida Gators, but he'll spend even more energy helping you and your family achieve what is financially important to you. The Retirement Sherpa can be heard on the Humble & Fred Podcast, weekly across North America, discussing the SHERPA Financial Planning process.

Our Philosophy is, "You can get everything you want out of life helping others get what they want".

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Who we are... Your Advisor

Jay Bondy
Financial Advisor
Associate

Jay has been a valuable member of our Sherpa Family, since 2019. He joined us bringing with him a combined 20 years of personal entrepreneurial and corporate business experience. As Jay's experience and knowledge evolve daily as a Financial Advisor, he knows that his life experience, passionate drive, dedication and commitment to excellence will be at the forefront to help serve others.

As your Financial Advisor Associate, Jay will coordinate the financial planning process for you. Jay will help you to identify your goals while working with you and Tim to implement a series of strategies that will help you realize your vision for the future.

A proud PGA of Canada member, Jay believes that all of our clients should be treated as members of an exclusive club, the Retirement Sherpa Family. His goal is simply, "to motivate and encourage others to define their own meaning of wealth."

We will help you reach your goals with our principles of professionalism, reliability, excellence, truthfulness and fun.

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Who we are... Your Team

Deborah Boyce-Taylor
Branch Administrator

Deborah Boyce-Taylor is an expert professional with significant experience in the financial industry. She has been the Branch Administrator at Tim Niblett's office for the last 18 years. Deborah is a results-focused professional who blends integrity, hard work and a willingness to listen to each client when addressing their needs.

As your Branch Administrator, Deborah will always ensure that our clients' needs are placed above all else. She knows that a win for our clients is a win for the Retirement Sherpa Team and Raymond James.

She is a team player, skilled at managing a broad range of strategic and operational issues to satisfy both corporate and customer requirements. Deborah is direct, decisive, and responsive with a proactive communication style. She is a beloved member of our Retirement Sherpa family.

Our team will continue to grow, improve, and learn so that we can honour the privilege of our clients' faith and trust in one of life's most important areas.

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S Setting and identifying measurable, important, enjoyable goals

H Having a plan, route, and time-tested methodology

E Expecting changes, risks, and opportunities from the original plan

R Reviewing progress on a regular basis for changing conditions, “winds and weather”

P Professional resource coordination between financial advisor, accountant, lawyer, etc.

A Appreciating that money is a means to an end, not what life is about

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Our Partnership with you

We provide holistic financial planning in the context of our expected long-term partnership with you. What we've learned most along the way is that helping people is the number one thing we do well. It's not about us. It's not about the markets.

It's about clients like you. As professionals, we have certainly accrued years of financial wisdom and experience, but that only really matters if the guidance and advice we provide is right for your life.

Helping you make sense of your money, explaining things in straightforward terms you can understand, devoting ourselves to doing what's best for you, and being here to help you tackle the important questions with thoughtful guidance and a helping hand – that's how we plan to make a difference in your life.

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We will Always

Strive to acquire and maintain a thorough understanding of your financial goals.
Update your current financial information on a regular basis.

Carefully assess and monitor your investment risk and time-frame.
Explain all recommended financial strategies and answer any questions you may have.

Update you as and when appropriate by email, mail and phone.
Meet with you regularly to review your Personal Financial Organizer (PFO).

Act as your primary advisor, coordinating the efforts of other professional resources.
Treat you with utmost respect and professionalism.

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The Keys to our Successful Journey

We've learned through experience that effective communication and mutual respect are essential to a long-term partnership. A few other criteria which help define our success include:

Your commitment to us and our team as your Financial Guides.
Your trust in our abilities to provide you with recommendations and advice.
Your complete disclosure about what matters to you most.

We need you to know that our recommendations are always based on helping you achieve your financial and lifestyle goals. It is important you understand that all investment, tax, estate and insurance advice will be based on the information you provide to us. Thus, in order for us to offer recommendations and advice best suited to you, we need you to fully participate in the financial planning process with us.

Mutual Responsibilities

Having a solid partnership is essential to effective financial planning. To this end, we both need to make your financial strategies a priority. We will agree to keep each other informed of any new developments that might affect these strategies. And we will agree to take the time to regularly review your personal/financial lifestyle goals and objectives.

We will always work together in the spirit of mutual trust, respect and understanding.

Our Partnership & Professional Resources

Your Retirement Sherpa Team with Raymond James Ltd. is a wealth advisory firm for a variety of clients who have a wide range of needs and goals they aspire to reach. Many are looking for a work-optional lifestyle and have specific bucket-list visions they want to accomplish.

We have chosen to work in a partnership with Raymond James Ltd. to ensure we can offer our clients independent financial planning advice and solutions second to none.

With Raymond James Ltd. as our partner, we can ensure our Retirement Sherpa practice is able to deliver exceptional client service, while offering a wide variety of professional resource solutions. Our network of professionals work with us to provide you the technical advice as required.

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Final Thoughts, Notes & Goals

"While our numbers are impressive, we recognize that our people are our greatest strength. In Canada and across our network, we share a vision of delivering the highest level of wealth management advice by always focusing on the unique needs of each client and their families. This client-first focus is further underscored by our core values of professional integrity, advisor independence and a conservative, long-term approach to investing."

- Raymond James, Ltd.

Your Notes:

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Your Goals:

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Scan the QR code to visit
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