An Introduction to Financial Management Principles

Learn how to manage your money better while focusing on what financial means and how to achieve it to build long-term goals and success. This discussion led by a financial advisor, will cover the basics of money management, including identifying and addressing financial barriers, debt payoff planning, emergency funds, breaking bad habits, and goal setting for future security.

Jonathan Leung, Financial Advisor

Jonathan is a seasoned financial advisor at the age of 36, boasting an impressive 16 years of experience in the industry. He takes pride in his holistic approach to financial planning; Johnathan is not your typical advisor. He's a visionary who believes in viewing retirement planning as more than just financial security. Johnathan's dedication to his craft has touched the lives of families not only across Canada but also in the United States, where he's helped countless individuals navigate their financial journeys with confidence and clarity. His commitment to excellence has garnered recognition on a global scale, including a feature in Forbes Magazine. Beyond the accolades, Johnathan is known for his engaging presentations delivered in diverse settings, from esteemed institutions like churches and universities to more inclusive venues such as retirement homes and large-scale events, where he's shared his expertise with audiences exceeding 12,000 attendees. Despite his professional achievements, Johnathan remains grounded in his role as a devoted husband and father of two young children, aged 4 years and 18 months. His genuine compassion for others shines through in every interaction, making him not just a trusted advisor but also a friend to those he serves.