



JAMIE TOWNSEND

Partner
Lawton Partners

ABOUT JAMIE TOWNSEND

Jamie Townsend and his team work with business owners, families, and professionals to help simplify their financial lives. Typically, this involves finding ways to reorganise their planning to achieve tax-efficient solutions for their succession, retirement, and estate planning challenges.

From a personal perspective, this includes focusing on areas such as total wealth accumulation, improved tax efficiency, dynamic withdrawals, cash flow planning, and proper retirement planning. From a business perspective, this also involves group benefits, group RRSP's and the Moneyball project to help business owners make informed decisions in growing and transitioning their business.

What have been some of your proudest achievements with Lawton Partners over the past 12 months?

We're grateful that our clients have handled the challenges of COVID-19 well and continue to strengthen their financial position. However, there have been difficult conversations along the way in 2020 due to health challenges or the impact of the COVID restrictions on local businesses. But it's in these moments that we can forge the strongest bonds given the gravity of the situation and the depth of expertise our team can bring. I am proud of the way our team rolled up their sleeves to find all ways to help our clients.

What do you hope to accomplish in 2021 and beyond?

Major long-term trends that began before the pandemic, have now sped up. The adoption of technology for home and work is one example. Global innovation has also continued at a blistering pace over the last 12 months and will have an incredible impact going forward to create wealth. For our

clients, 2021 will hopefully be a year of renewed optimism as we progress through the impact of COVID, begin to reconnect with family and friends in person and continue to focus on the things we each cherish most.

What does this award mean to you?

Our successful business owners and families are busy, and with the increased pace of life comes additional complexity. We're appreciative to be acknowledged for the work we do on behalf of our clients to simplify their financial lives. For many families, we are now onto the 2nd generation of helping them navigate the constantly changing complexities. It is a rich and rewarding experience to be part of their lives in such a meaningful way.



CONTACT

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