

JEANETTE BOLEANTU

"Wealth on Purpose, with Purpose"

"There's always a 'now what?' You've paid off your home, you've saved for your retirement, now what?' I have the opportunity to peel back the layers and help people take control and dream their legacy."

Jeanette Boleantu, PFP®, CFP®, Senior Wealth Advisor with Assante Financial Management Ltd., and Owner of The Expatriate Group, describes the majority of her clients as 'global citizens with international components to their financial DNA.

The Expatriate Group provides fee for service financial coaching. The main function is the assessment of Canadian professionals with international complexity to identify issues pertaining to Canadian tax residency and non-residency status.



Jeanette Boleantu, B.Mgt, PFP®, CFP®

Evaluating Canadian Citizens fact patterns and identifying issues relating to the fundamentals of financial planning.

Her client base ranges from coast to coast – Haida Gwaii to Halifax and Ecuador to Indonesia. This includes the next generation born or raised in expatriate communities, a group she refers to as 'Next-Pats.'

"These individuals experience the world in a way that others don't; through what I call an 'opportunity concentration lens,'" says Jeanette. *"It's almost like Next-Pats are walking around with 3-D glasses on, revealing opportunities like a heat map as a direct result of multiple country and cultural exposure in their formative years."*

FINANCIAL BEHAVIORS

Jeanette holds a firm belief that the first step to financial wellbeing is understanding drivers behind financial behaviors. The key to wealth creation is matching personal needs with financial objectives. “I work with amazing individuals all traveling on different journeys and help facilitate meaningful conversations always trying align their financial plan with their core life motivation,” says Jeanette.

“We have worked hard together on wealth creation and preservation. Now, I’m excited about the role philanthropy, legacy and planned giving plays, particularly focusing on the client’s goals and aspirations.”

PEACE OF MIND

It’s honourable work with deep and lasting impacts. “We hear many stories from people sharing their gratitude for our guidance and support. The most important impact we make is providing peace of mind,” says Jeanette. “That’s what I always hear from my clients, especially whenever we lead them through major life transitions. “Thank you for the peace of mind.”

SCIENTIFIC PROCESS

As her father built their wealth management practice after leaving work as an exploration geologist, it makes sense both generations of Boleantus attracted a huge client base of geo-scientists, including engineers, geologists, and geophysicists. “My Dad maintained his Professional Geologist credentials long after he left the field,” says Jeanette.

“Applied scientists and engineers hold themselves to an exceptional ethical and professional standard. I wish I could put ‘daughter of a geologist serving engineers and geo-scientists since 2006’ on my business card. I’ve been trained to hold their standards, honour, and track the details. I approach my work following the scientific process and maintain the accountability and transparency these professionals expect.”

With experience under her belt at the practice, Jeanette took over the reins in 2019 and her father recently retired at the age of 83 in 2021.



My goal has always been clear: provide deeper conversations, service excellence and focus on the delivery of complete financial advice from coast to coast.

This is why I’m here.

Jeanette Boleantu, B. Mgt, PFP®, CFP®
Senior Wealth Advisor & Certified Financial Planner





PLANNING FOR THE UNEXPECTED

That massive responsibility hit home in 2016 at the age of 36 when her husband was diagnosed with stage-four brain cancer and their children were in grades three and five. “We have made it through brain surgery, chemotherapy, and radiation,” says Jeanette.

“Going through a traumatic health experience like this added maturity to my planning practice. I remember the social worker coming into the room to have a ‘conversation’ with me, basically visiting me to find out if I was about to become homeless and needed access to government resources.

She told me 80 percent of Calgarians that go through a similar circumstance cannot pay their mortgage the following week. That was a big gamechanger in how I handled the practice because he had a good job and employment benefits, we maintained financial independence.

It shaped my planning in a major way I continue to be supported by his positive outlook and survivor mindset. When I’m sitting across from my clients, I am driven at the core to protect their financial fortress.”

Today she looks after approximately 110 families on the investment side of the business, including the Next-Pats she so enjoys working with. **“I’m very disciplined when paying attention to the liquidity in the short-term so people are not needing to touch their assets in a market correction,”** says Jeanette.

“Basically, I guide people on where to put their money, how to make it grow, and how to keep what they make.”

REGULATORY REFORM

She also continues to be a voracious learner working to stay ahead of the industry. Increasingly stringent regulatory reform and volatile markets make for challenging work, but for Jeanette, the reward is abundantly greater.

FINANCIAL HEALTH

“Sometimes we cover sensitive topics and I am grateful for the opportunity to talk about money in a different way,” says Jeanette.

“Like physical health, financial health is essential to a secure and comfortable future. I often liken looking after people’s financial health to being a medical practitioner. We diagnose and prescribe, focusing on the overall well-being of our clients as patients.

We are with our clients for the long haul, monitoring their progress, listening to their concerns, calming their fears, and so much more. This is important work and holds a lot of responsibility.”

PASSION FOR PEOPLE

Jeanette possesses a natural curiosity and passion for people. “I’m focused on having deeper conversations, asking questions about how people make decisions, and really understanding what is behind those decisions. I enjoy getting to know people. I truly care about what matters to them,” says Jeanette.

“There’s always a ‘now what?’ You’ve paid off your home, you’ve saved for your retirement, now what?’ I have the opportunity to peel back the layers and help people take control and dream their legacy.

GLOBAL CITIZENS

The work gives her an opportunity to live vicariously through her clients she says.

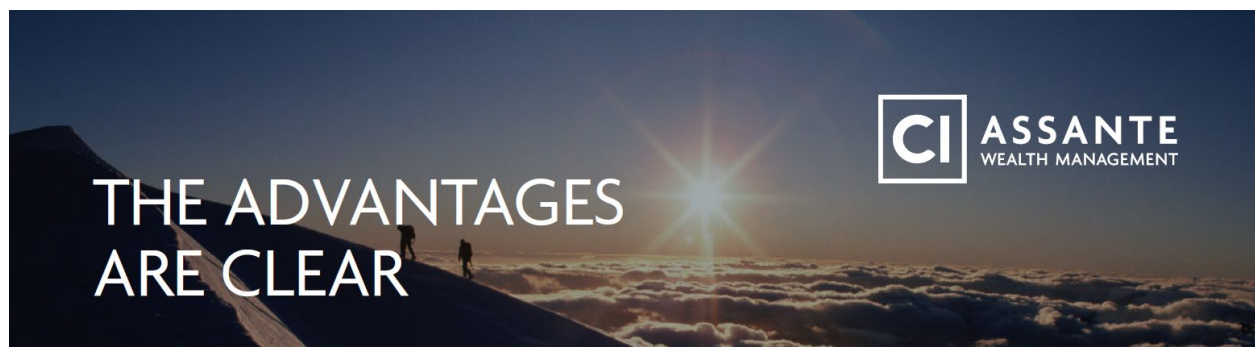
“I get really excited talking to people all over the world,” says Jeanette.

Relocation between international assignments is an intrinsic part of our clients' lives. As a result, an integral part of our practice is managing foreign tax codes, international tax treaties, and relocation support.

A client change of address is what we call Tuesday around here. The commonality between my clients is that they all have sand in their shoes. **My job is to figure out which beaches they want to see and help them get there.** I’m blessed to have purpose behind my work and the trust of so many individuals.

Natalie Noble

Natalie Noble’s love of writing stems from her passion for hearing and sharing people’s stories. Over the years she has written for various business, real estate, and agriculture publications. At the heart of her work is a desire to continuously learn and connect.



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