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Family. Business. Legacy.

Biography for Mark Halpern, CFP, TEP, MFA-P

Mark Halpern, Certified Financial Planner (CFP), Trust and Estate Practitioner (TEP), Master Financial Advisor, Philanthropy (MFA-P) has helped business owners, entrepreneurs, professionals, and affluent families for 30 years.

As CEO of WEALTHinsurance.com®, Mark and his team provide tax-advantaged insurance solutions to protect families and their businesses, working closely with accountants, lawyers, bankers, and other financial professionals to provide comprehensive estate planning solutions for their clients.

Widely known for his philanthropic activities, Mark is Chair of the Professional Advisory Committee at the Jewish Foundation of Greater Toronto and a Trustee, a member of the Professional Advisors Council at SickKids Foundation, Promise Legacy Council at St. Joseph's Hospital Foundation, Professional Advisor Task Force at St. Michaels Hospital Foundation, Planned Giving Advisory Committee at TVOntario, Toronto Estate Planning Council, Society of Trust & Estate Practitioners, Canadian Association of Gift Planners and CALU.

Mark's corporate goal is the creation \$100 Million of new philanthropy annually working with clients, generous donors at non-profits and allied professionals in the fields of law, accounting, insurance, finance, and investment management.

Outside of business, he teaches leadership and business ethics courses to professionals and university students at York, U of T, Ryerson, and Western. He's been married to Rhonda for 25 years and they are kept busy with their 5 children.

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