

SHARON CHARTRAND
Independent Financial Consultant

Education

Knowledge Bureau, Inc.

Certificates Available, Karen Sharon Chartrand, completed study Financial Education, over 30 courses grade average 98% average

2014 – 2015

MGF0522 Charity Law and Taxes

MGF0523 Gift Plan Strategies

MGF0521 Why Philanthropy?

MGF0522 Charity Law and Taxes

MGF0523 Gift Plan Strategies

MGF0524 Gifts of Life Insurance

MGF0525 Intergrating Philanthropy into Your Practice

MGF0531 Taxation of Income from a Proprietorship

MGF0532 Transactions Involving Business Assets

MGF0533 Home-Based Businesses

MGF0534 Disposing of and Replacing a Business

MGF0513 Developing a Shared Vision

MGF0423 Snowbirds

MGF0412 Real Estate

MGF0413 Principal Residences

MGF0515 Advising Family Businesses

MGF0535 Professionals and Partnerships

MGF0512 Working in Alignment with your Family Business Clients

MGF0514 Structuring Retirement Income

MGF0511 Understanding the Family Business

MGF0521 Why Philanthropy?

The Knowledge Bureau

Karen Sharon Chartrand study Financial Education, 98%

2014 – 2015

MGF0424 Foreign Property Ownership

MGF0425 US Citizens in Canada

MGF0431 Planning for Post Retirement Incapacity

MGF0432 At Death and Beyond

MGF0433 Planning for Survivors

MGF0411 Tax Efficient Asset Transfers: Managing ACBs

MGF0435 Strategic Philanthropy

MGF0434 Business Owners and Executives

MGF0414 Tax Efficient Debt Management

MGF0415 Risk Management

MGF0421 Residency

MGF0422 Immigration and Emigration

IFSE Institute, WFG Education, RESP Scholarship

2010 – 2013

Industry Resources

Registration information was last refreshed on 2015-08-13 17:32 PST.

Individual Historical Record - Previous (not current) Registration Information

NAME: KIRK, Karen Sharon

BRITISH COLUMBIA

Firm WFG SECURITIES INC.

Category Dealing Representative (Scholarship Plan Dealer)

From March 27, 2012

To October 31, 2013

Status Historical

Category Dealing Representative (Scholarship Plan Dealer)

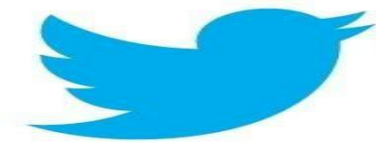
From April 01, 2011

To October 04, 2011

Status Historical

Contact Information

ABBOTSFORD BC V2S 1L9



Canadian Securities Administrators

LNM Insurance & Investments

January 2009 – Present (6 years 10 months) Abbotsford - Vancouver

As a financial advisor my goal is to draw a Dream map for my clients and build their portfolio so they can achieve their dreams.

Licensee Information Insurance Council of BC

Full Name: Karen Sharon Chartrand

Business Address:

Programming changes underway. Business address not currently able to display.

Licence Status:

ACTIVE

Licence Class:

Life Insurance

Canadian Securities-administrators.ca

Registration Information National Registration Search

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