



Mark Halpern, CFP, TEP, MFA-P

Mark Halpern, Certified Financial Planner (CFP), Trust and Estate Practitioner (TEP), and Master Financial Advisor - Philanthropy (MFA-P) has helped business owners, entrepreneurs, professionals, and affluent families for 32 years. As CEO of WEALTHinsurance.com®, Mark and his team specialize in tax-advantaged insurance solutions to protect families, create charitable legacies, and preserve estates. Mark works closely with clients' accountants, lawyers, insurance, and investment professionals to provide comprehensive estate planning solutions as part of the team.

Widely known for his philanthropic activities, Mark is Chair of the Planned Giving Advisory Council at Humber River Hospital Foundation, a Trustee and former Chair of the Professional Advisory Committee at the Jewish Foundation of Greater Toronto, 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. Michael's Hospital Foundation, Planned Giving Advisory Committee at TVOntario, Toronto Estate Planning Council, Society of Trust & Estate Practitioners (STEP), Canadian Association of Gift Planners (CAGP) and Conference for Advanced Life Underwriting (CALU).

Mark is a faculty member and contributed curriculum content for the groundbreaking Master Financial Advisor-Philanthropy (MFA-P) designation. He is building a national community of 100 financial professionals and charities with the goal of creating \$1 Billion of philanthropy annually.

<https://wealthinsurance.com/billion.php>

Outside of business, he teaches leadership and ethics classes to young professionals, families, and university students. He's been married to Rhonda for 27 years and they are kept busy with their 5 children.