Neela White, FCSI®, CIWM®, CIM®, CPCA®, EPC™,CEA®,
Senior Portfolio Manager

Neela advocates for open discussion and preparation in the event of life-changing illnesses to better equip families to understand the burdens, both financial and emotional, of long-term care costs.

Her relatable style inspires families to examine their longevity planning and empowers them towards a fresh conversation about viable options. Neela presents an empathetic approach when assisting clients with their finances and draws on her firsthand experience from having her first career in long-term care and from being a caregiver to her parents for more than a decade of her life.

Neela White is partner and co-founder of Blue Wing Advisory Group, Raymond James Ltd. She has more than 25 years working in the financial industry, providing insight and inclusive wealth management services for a variety of clients as both an aging specialist and senior portfolio manager.

She is a graduate of the University of Western Ontario with a degree in Psychology, from McMaster University with a degree in Gerontology, and a certificate in Thanatology. In addition, she is a Certified Professional Consultant on Aging (CPCA), an Elder Planning Counselor (EPC), and a Certified Executor Advisor (CEA). A senior portfolio manager with a twist, she is a Certified Patient Navigator and Certified Dementia Care Provider.

Through the Home Hospice Association, she completed a course on becoming a death doula. Currently, Neela is working on a book for caregivers, care recipients and the sandwich generation.

As an active speaker about caregiving and aging, the cost of aging, health care navigation and the sandwich generation, Neela often participates in conferences, interviews, podcasts, and educational events; most recently the Ivey Professional Leadership Program (UWO).

She has also been featured in industry publications such as the Wealth Professional, My Business Magazine, Best Health magazine, and the Advantaged Investor podcast. Neela is an active member and presenter for the Canadian Securities Institute and was a participant in their Financial Health for Seniors initiative. Neela has created an educational webinar series, The Open Dialogue on Aging™, now in its fourth year. It's focus is on all aspects of aging. Neela is also the author of a monthly newsletter titled Perspectives on Longevity™.