

Bev Evans, CFP, TEP, CIP, EPC
Retired Wealth Advisor, Portfolio Manager

Recently retired from practice, Bev has had a long and successful career in wealth management as a specialist in advising women, elder clients and their families. Recognized in the industry for her holistic, client-centred approach, she has developed a deep, practical understanding of how to communicate with her client families, often building relationships that spanned three generations. Bev has also co-authored two books intended as practical resources to help families have “The Talk.”

An early adopter of the EPC designation, Bev has been passionate about working with the elderly and the families of those who are facing age-related challenges. She has been consulted extensively by industry and media for her holistic approach and is a member of our EPC in class teaching faculty. We’re delighted she is back presenting at this year’s EPIC.