Neela White FCSI, CIWM, CIM®, CPCA®, EPC, CEA, FMA
Senior Wealth Advisor & Senior Portfolio Manager

Neela White is a passionate advocate for open discussions and preparation for life-changing illnesses, helping families understand the financial and emotional impact of long-term care. Her relatable style encourages families to plan for longevity and explore viable options. Drawing from her experience working in long-term care and as a caregiver for more than a decade, Neela provides empathetic financial guidance.

Neela is a partner and co-founder of the Blue Wing Advisory Group at Wellington-Altus Private Wealth. With more than 29 years in the financial industry, she provides inclusive wealth management services as an aging specialist, Senior Wealth Advisor, and Senior Portfolio Manager. She holds degrees in Psychology and Gerontology and a certificate in Thanatology. Additional certifications include Certified Professional Consultant on Aging®, Elder Planning Counselor™, and Certified Executor Advisor®. She is also a Certified Patient Navigator and Certified Dementia Care Provider™, with training in MAID and death doula services. In addition, she has completed the U-First® program, Last Aid®, and is a Last Aid Facilitator.

An active speaker on caregiving, the costs of aging, health-care navigation, and longevity planning, Neela participates in conferences, panel discussions, media interviews, podcasts, and educational events. She has been featured in various industry publications, is a member and presenter for the Canadian Securities Institute, and participated in its Financial Health Seniors Initiative. She is also a frequent guest on BNN Bloomberg TV and a contributing author for Advisor.ca and Investment Executive. Her expertise has been featured in interviews with The Globe and Mail, Healthing.ca, and Wealth Professional. Additionally, she serves as an educational sponsor and presenter for the Empowered Seniors Speakers Series, a program dedicated to informing and educating seniors on a variety of timely and pertinent topics. More recently, she joined the faculty for the Canadian Initiative for Elder Planning Studies.

Neela created the educational webinar series The Open Dialogue on Aging™ and authors the newsletter Perspectives on Longevity™. She is currently working on a book for caregivers, care recipients, and the sandwich generation, while also pursuing certification as a Neuroplasticity Coach.