Five-Star Advisor Thane Stenner Featured on Wealth Professional TV in Client Service Segment

As one of the Wealth Professional 5-Star Advisors, Mr. Stenner was featured to discuss client service and the importance of mentorship.

MONTREAL, QUEBEC, CANADA, July 12, 2023 /EINPresswire.com/ -- Senior Portfolio Manager & Senior Wealth Advisor Thane Stenner of Stenner Wealth Partners+ at CG Wealth Management Canada joined Wealth Professional (WP) TV host, Noelle Boughton to discuss how a less-is-more approach to wealth management is a valuable strategy in wealth management and outline his thoughts on mentorship and client service.

In the eleven-minute segment, Mr. Stenner discussed in great detail his passion for serving clients and creating a relational approach to portfolio management. Throughout the discussion, Mr. Stenner's focus led back to fostering healthy relationships with clients that facilitate trust and build proactive, focused services with fewer clients, but the best clients. Surrounded by his award-winning team, Mr. Stenner leads Stenner Wealth Partners+ of CG Wealth Management Canada in serving ultra-high-net-worth clientele.

"Less is, to err on the side of cliché, more," says Mr. Stenner of his approach to building client relationships. "I spent close to a decade bringing our client base down to a manageable core of purposeful, well-suited clients so that we could build the right relationships from the beginning."

Mr. Stenner and his team service 46 clients, mostly in Canada with a few in the United States, with net worths ranging from $25 Million to over $1 Billion. In the WP TV profile, Mr. Stenner describes his sophisticated clientele and the ways his group works to proactively anticipate how needs and wants change as they manage a client's portfolio. He goes further to discuss fostering meaningful relationships with his team and the next generation of wealth advisors as well.

Noelle Boughton serves as News Editor for Key Media, overseeing all features relating to the Wealth Vertical. She has been a journalist for over thirty years, working in online media as well as print and broadcast. Wealth Professional Canada is a free online publication considered an industry go-to for up-to-date, insightful information about the Wealth Sector. It is owned by Key Media.

Thane Stenner is cross-border licensed in USA and Canada via FINRA and IIROC. Previously, he acted as a Managing Director, International Client Advisor, Institutional Consulting Director, and Alternative Investments Director at Morgan Stanley Wealth Management where he led his team in managing portfolios for ultra-high net worth clients.

He graduated cum laude from Arizona State University and attended Harvard Business School's Executive Program. Stenner's unique expertise and knowledge have been featured across several business news outlets including, the Globe & Mail, Financial Post, CNBC & BNN Bloomberg.

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For more news and information about Thane Stenner, please visit https://stennerwealthpartners.com/. You can also find him on Twitter and LinkedIn.

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