

Rob Tetrault Clarifies the Role of Investment Advisors and the Importance of Fiduciary Standards

WINNIPEG, MB, CANADA, May 19, 2025 /EINPresswire.com/ -- Rob Tetrault, an award-winning [Senior Portfolio Manager](#) and head of the [Tetrault Wealth Advisory Group](#) at CG Wealth Management, has released an informative discussion aimed at demystifying the roles within the financial advisory sector and emphasizing the significance of fiduciary responsibility.

In his latest presentation, Tetrault delineates the distinctions among mutual fund representatives, investment advisors, and portfolio managers in Canada. He underscores that while all three can provide financial advice, their capacities and obligations differ markedly.



Mutual fund representatives are authorized to buy and sell mutual funds on behalf of clients. Investment advisors, having completed the Canadian Securities Course and registered with the Canadian Investment Regulatory Organization (CIRO), can manage client assets and offer a broader range of investment options. However, Tetrault points out that investment advisors are not bound by fiduciary duty and cannot operate on a discretionary basis, meaning they require client consent for each transaction.

The highest standard of client care is upheld by portfolio managers, who are fiduciaries obligated to act in their clients' best interests at all times. This fiduciary duty ensures transparency, as portfolio managers must avoid conflicts of interest and are prohibited from earning commissions on trades, operating instead on a fee-based model that aligns their interests with those of their clients.

Tetrault advises investors to inquire about their advisor's designation—whether they are a mutual fund representative, investment advisor, or [portfolio manager](#)—to fully understand the level of care and service they are receiving.

Beyond investment selection and asset allocation, Tetrault emphasizes the comprehensive services that a fiduciary portfolio manager provides, including financial planning, tax strategies, insurance planning, and estate planning. These services are integral to a holistic approach to wealth management, aiming to preserve and grow clients' assets while ensuring their financial goals are met.

About Rob Tetrault

Rob Tetrault is a distinguished Senior Portfolio Manager and head of the Tetrault Wealth Advisory Group at CG Wealth Management. With a background in law and finance, he is committed to providing transparent, client-first wealth management services. Tetrault has been recognized multiple times as one of Canada's Top 50 Financial Advisors by Wealth Professional.

Rob Tetrault

Tetrault Wealth Advisory Group - CG Wealth Management

+12049973376 ext.

[email us here](#)

Visit us on social media:

[LinkedIn](#)

[Instagram](#)

[Facebook](#)

[YouTube](#)

[X](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/812550611>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2025 Newsmatics Inc. All Right Reserved.