Free Financial Planning: Dunbrook Associates Offers Complimentary Consultations to New Clients

To help promote financial literacy, Dunbrook Associates, Financial Advisors of Barrie, Ontario, is offering complimentary financial consultations to new clients

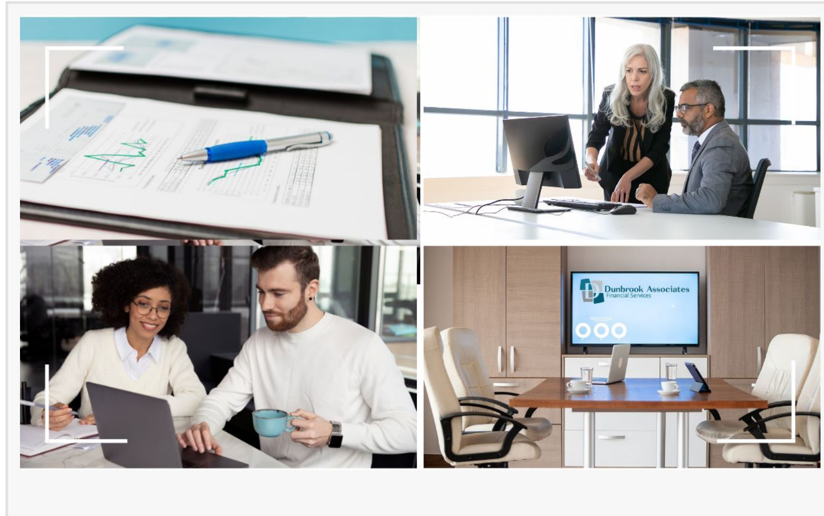
BARRIE, ONTARIO, CANADA, June 13, 2025 /EINPresswire.com/ -- In effort to help promote financial literacy, Dunbrook Associates, a leading financial advisory firm based in Barrie, Ontario, is proud to announce that it will be offering complimentary financial consultations to new clients. This initiative aims to make financial guidance more accessible to the local community while highlighting the importance of strategic planning at every life stage.

> Planning isn't about being perfect, It's about progress. One smart choice today can lead to decades of financial confidence."
>
> *Chris Arthur*

"Whether you're just starting out, preparing for retirement, or managing investments, having a solid financial plan is key to achieving peace of mind," said Chris Arthur, Partner & Head of Wealth Management at Dunbrook Associates. "Offering free Financial Consultations to new clients gives us the opportunity to meet with new faces, answer pressing questions, and offer personalized advice—at no cost."

Why This Matters More Than Ever
In today's economy, many Canadians are facing rising costs of living, inflation concerns, and growing uncertainty about long-term goals such as home ownership, debt repayment, and retirement readiness. A recent study by FP Canada shows that only 30% of Canadians have a comprehensive financial plan, despite the fact that those who do are significantly more likely to feel in control of their finances and confident about their future.

“We’ve seen firsthand how personalized financial planning can reduce stress and improve quality of life,” says Chris Arthur. “This isn’t just about investments—it’s about helping individuals and families understand their full financial picture, make informed decisions, and stay resilient during uncertain times.”



What to Expect from a Complimentary Consultation

New clients who participate in a Free Financial Consultation with Dunbrook Associates can expect a 30–45-minute one-on-one consultation with a certified financial advisor. During this meeting, clients will:
- Review their current financial situation
- Identify short- and long-term financial goals
- Receive a preliminary analysis of budgeting, saving, insurance, and investment strategies
- Have the opportunity to ask questions in a no-pressure environment
- Learn how a long-term partnership with a financial advisor can help them stay on track

Clients will leave with actionable insights, a better understanding of financial planning, and clarity on their next steps.

Who Should Participate?

This offer is open to residents of Barrie and surrounding areas who have not previously worked with Dunbrook Associates. It’s ideal for:
- Young professionals just starting their careers
- Families looking to balance daily expenses with future savings
- Pre-retirees who want to maximize their retirement income
- Business owners seeking tax-efficient strategies
- Individuals navigating life transitions such as marriage, divorce, inheritance, or career changes

No matter your background or net worth, everyone deserves access to quality financial advice.

About Dunbrook Associates

Founded in 1990, Dunbrook Associates has built a reputation for providing ethical, personalized, and forward-thinking financial guidance. With a team of certified professionals, the firm offers a wide range of services including:
- Retirement Planning
- Investment management

- Insurance strategies
- Tax planning
- Estate planning
- Wealth preservation
- Business succession planning

Dunbrook Associates operates with a client-first philosophy and a strong commitment to financial literacy, community involvement, and long-term partnerships.

“We’re not just here to help you grow your wealth,” says Chris Arthur. “We’re here to help you protect it, understand it, and use it to live a meaningful life.”
How to [Book a Free Consultation]
Interested individuals can schedule their complimentary consultation by:
- Calling Dunbrook Associates - 1-866-730-7598
- Visit - https://dunbrook.ca
- Email - admin@dunbrook.ca

Appointments are available Monday through Friday during business hours, and limited evening slots are available upon request. Spots are limited and expected to fill quickly, so early booking is encouraged.

A Chance to Take the First Step
Too often, people delay financial planning because they feel overwhelmed, unsure where to start, or afraid of what they’ll discover. Dunbrook Associates is hoping that Free Financial Planning Consultations will give people the nudge they need to take that important first step.

Dunbrook Associates invites residents all across Ontario to contact them today and experience the benefits of clear, trustworthy financial advice. Whether you have a specific goal or just want to know where to begin, a free consultation can make a world of difference.

Chris Arthur
Dunbrook Associates
+1 866-730-7598
email us here
