SWAN Wealth Management launches cross-border video series for Americans moving to Canada

New educational series addresses wealth preservation strategies, charitable giving, trusts, investments and estate planning before relocation

KELOWNA, BRITISH COLUMBIA, CANADA, July 21, 2026 /EINPresswire.com/ -- SWAN Wealth Management has launched the first installment of a new five-part cross-border video series designed to help very-high-net-worth Americans prepare for the financial complexities of moving to Canada. The series explores tax, investment, wealth management and estate planning topics that affluent Americans should understand before establishing Canadian residency.

> People often come to us after they've already fallen into major tax or investment traps. And that's why I make these videos. I want to help people avoid costly mistakes and create a proper plan."
>
> *Tiffany Woodfield*

The first video in the series was released on July 14, 2026, on the SWAN Wealth Management YouTube channel and in the firm's cross-border video library. New videos will be released weekly, with the second video scheduled for July 21.

The series features Tiffany Woodfield, Senior Wealth Advisor, Portfolio Manager, CRPC®, CIM®, TEP®, and co-founder of SWAN Wealth Management. Woodfield is a cross-border wealth advisor who works with Americans, green card holders, and Canadians navigating complex financial planning decisions between the two countries. Her clients include business owners and tech professionals moving across the border as they transition into a work-optional stage of life.

The first video, "How Much Do Financial Advisors Cost in Canada?", explains how advisory fees are structured in Canada and highlights key differences Americans may encounter when comparing Canadian wealth management services with those in the United States.

Up next, "How Wealthy Americans Use DAFs Before Moving to Canada", explores how donor-advised funds may create planning opportunities before an American becomes a Canadian resident. It is particularly relevant for individuals with appreciated mutual funds who also have philanthropic goals.

“I work with U.S. and Canadian clients every day, and over the years, I’ve seen hundreds of smart business owners and professionals make very costly mistakes,” said Woodfield. “People often come to us after they’ve already fallen into major tax or investment traps. And that’s why I make these videos. I want to help people avoid costly mistakes and create a proper plan.”

Tiffany Woodfield, SWAN Wealth Management, Senior Wealth Advisor, Portfolio Manager, CRPC®, CIM®, TEP®

Moving from the United States to Canada affects how investments, trusts, charitable giving strategies and estate plans are treated.

Decisions involving appreciated mutual funds, U.S. trusts and existing investment accounts can have unexpected tax and planning consequences after Canadian residency begins. The series encourages families to review these issues before relocating rather than trying to correct avoidable problems afterward.

Without coordinated cross-border advice, a strategy that worked in the United States may no longer be appropriate after moving to Canada.

Future videos in the series include:

“How Wealthy Americans Use DAFs Before Moving to Canada”
“Cross-Border Wealth Management Strategies for Americans in Canada”
“U.S. Trusts vs. Canadian Trusts — What Actually Changes When You Move”
“Exact Steps to Take If You’re Moving from the USA to Canada”

Together, the five videos are designed to help affluent Americans identify key tax, investment, and estate-planning issues before relocating to Canada, providing them with the information they need to make better-informed decisions.

The videos provide general education and are not a substitute for personalized financial, tax or legal advice.
The first video is available now in the SWAN Wealth Management cross-border video library at www.swanwealthcoaching.com/videos. Additional videos will be released weekly.

SWAN Wealth Management is a cross-border wealth management and financial advisory firm based in Kelowna, British Columbia, with an additional office in Vancouver, BC. The firm helps

Americans, Canadians and green card holders moving across the Canada–U.S. border coordinate their investments, wealth management and estate planning for their country of residence. SWAN Wealth Management works with more than 190 cross-border clients across Canada and the United States and manages just under $500 million in assets. Learn more at https://www.swanwealthcoaching.com/about-swan-wealth.

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