EINPRESSWIRE

Dunbrook Associates Named Financial Services Review Canada’s Top Independent Financial Planning Service in Canada 2026

Dunbrook Associates has been recognized by Financial Services Review Canada as the Top Independent Financial Planning Service in Canada for 2026.

FORT LAUDERDALE, FL, UNITED STATES, August 14, 2026 /EINPresswire.com/ -- The recognition highlights the firm’s commitment to personalized financial guidance and its planning-first approach to helping individuals, families, professionals and business owners pursue their long-term financial goals.

Dunbrook Associates provides independent financial planning services to clients throughout Ontario and across Canada. Rather than beginning with a particular financial product, the firm starts by gaining a clear understanding of each client’s financial circumstances, priorities, concerns and vision for the future.

“We are proud to honor Dunbrook Associates as the Top Independent Financial Planning Service in Canada for 2026,” said Jeff Rodriguez, Managing Editor of Financial Services Review Canada. “The firm’s commitment to putting financial planning ahead of product sales, coupled with its disciplined approach to tax optimization, retirement planning and estate strategy, reflects the kind of client-centric advisory model that is redefining independent financial planning.”

The recognition comes as Canadians face increasingly complex financial decisions. Inflation, changing interest rates, evolving tax rules, longer life expectancies and uncertainty in global markets have made coordinated financial planning more important than ever. Many households must balance several competing priorities, including homeownership, education funding, retirement preparation, family protection and the transfer of wealth to future generations.

Dunbrook Associates helps clients evaluate how the different components of their financial lives work together. Its comprehensive services include investment planning, retirement income planning, tax and cash-flow strategies, insurance protection, estate planning, mortgage planning and financial guidance for business owners.

By considering these areas as part of one coordinated strategy, the firm helps clients make more informed decisions and understand how one financial choice may affect another. The goal is to create a practical plan that reflects the client's current position while remaining flexible enough to evolve as circumstances change.

For example, a professional in the wealth-building stage may require a strategy focused on cash flow, debt management, investments and insurance protection. Someone approaching retirement may be more concerned with generating sustainable income, coordinating pensions and government benefits, reducing taxes and protecting an estate. Business owners may need additional planning related to corporate assets, compensation, insurance, succession or the future sale of their company.

Retirement planning remains one of Dunbrook Associates' central service areas. Preparing for retirement involves more than reaching a particular savings target. Clients must also consider how income will be generated, how long their assets may need to last and how registered accounts, non-registered investments, pensions, government benefits and other resources can work together.

Tax planning is also incorporated throughout the firm's financial planning process. While taxes should not be the only factor guiding a financial decision, tax efficiency can play an important role in preserving wealth and supporting long-term financial outcomes.

Investment recommendations are developed within the context of each client's goals, time horizon, income requirements and comfort with market fluctuations. Instead of viewing investment performance in isolation, Dunbrook Associates considers how each strategy supports the client's broader financial plan.

Estate planning and insurance strategies can further help clients protect their families, businesses and accumulated assets. When specialized legal or accounting guidance is required, the firm can work alongside a client's other professional advisors to support a coordinated planning process.

Receiving this 2026 recognition reinforces Dunbrook Associates' dedication to independent, client-focused financial guidance. The firm remains committed to helping clients understand their choices, coordinate their financial resources and develop strategies designed to support both their immediate priorities and long-term objectives.

About Dunbrook Associates:
Dunbrook Associates is an independent financial planning firm serving individuals, families, professionals and business owners in Barrie, Toronto, Burlington and communities throughout

Ontario and across Canada. The firm provides guidance in retirement planning, investment planning, tax and cash-flow planning, estate planning, insurance strategies, mortgage planning and financial planning for business owners.

Through personalized advice, coordinated strategies and ongoing plan reviews, Dunbrook Associates helps clients navigate important financial decisions with greater clarity and confidence. To learn more, visit www.dunbrook.ca.

About Financial Services Review Canada:
Financial Services Review Canada is a print and digital industry magazine reaching 58,000 qualified subscribers across Canada. Its print publication carries ISSN 2835-9763, while its digital edition carries ISSN 2835-9771.

Dunbrook Associates
Dunbrook Associates
admin@dunbrook.ca
Visit us on social media:
LinkedIn
Facebook
YouTube
