

# BeyondAshton

Fall/Winter 2014-2015

AS TOLD BY ASHTON COLLEGE ALUMNI

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Education is your passport to the future

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Ashton alumni pursue their passions and find success

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Certified Financial Planner Alex Chan talks about the financial services industry and the importance of getting the right credentials for career advancement

# INVESTING IN THE RIGHT CREDENTIALS

**“I wanted that added credibility on my  
resumé — something to reassure my  
clients and my peers.”**

Careers in the financial services industry demand long working hours and require a drive to succeed in a fast-paced environment. This challenging sector is where Certified Financial Planner Alex Chan continues to thrive.

“I’ve worked for several years as an advisor in the Managing General Agency (MGA) business and marketing,” says Chan, currently the Marketing Director for BC for IDC World Source Insurance. He says his current job mainly involves “recruitment, training, case consultation, business planning and independent financial advising.”

While it is challenging to work in financial services, Chan enjoys the dynamic nature of the industry. “There’s no typical day,” he says. “Most days, I’m out of the office, at client functions, dinners or at meetings with clients and other advisors. There is a wide variety of things to do, and I enjoy the flexibility that my job offers.”

Born in Hong Kong and raised in Vancouver, Chan initially ventured into life insurance as a career agent with Manulife Financial. After many years of finding success in the agency system, he began working as an independent Managing General Agency, and he currently manages over 150 independent financial advisors.

Chan’s credibility is a vital factor in his professional success, and it is backed up by credentials he has acquired throughout his career. “I hold five professional designations, two of which are from Ashton College. I wanted that added credibility on my resumé – something to reassure my clients and my peers.”

He currently holds the CHS, CFP, CPCA, EPC and CFSB licensing and designations, giving him an edge in financial services. “People do business with people they know, like and trust,” he emphasizes on his website.

“Consumers are smarter than ever and they are looking at your qualifications. Ashton could provide me with the credibility within the industry that everyone is looking for.”

He says he took the EPC designation over a long weekend. “It was a condensed course, which was great for me because I haven’t really got the time – no one in my business does! The materials were good, and the moderators were great.”

Chan believes that obtaining the right credentials is the best way to advance your career. “We all get into careers because we have to make a living—there is no way around it. Unlimited income potential in my field is why I stayed. My industry is highly rewarding financially. Most importantly, it is emotionally rewarding to financially better the lives of the clients we serve, and to positively enhance the lives and businesses of the advisors we work with.” ■

# ALEX CHAN,

CHS, CFP, CPCA, EPC, CFSB

CERTIFIED FINANCIAL  
PLANNER (CFP®)

2004

