



# MULTI-DISCIPLINARIAN

**Christine Van Cauwenberghe** has always seen the value of bridging various disciplines with the goal of putting the client first

Commerce and law diplomas in hand, Van Cauwenberghe was bought on board at Thompson, Dorfman, Sweatman. "It was monumental for me to join a prestigious firm doing such interesting work. We were expected to bring in our own clients – I had no idea how. I realized I needed to network and started working with financial planners."

**1994**  
STARTS IN LAW

**2001**  
JOINS THE TEAM



Van Cauwenberghe got her introduction to the wealth management world through a job at Investors Group, where she worked on a multi-disciplinary team of lawyers, financial planners and accountants.



**2002**  
SPEAKS OUT

Early in her career with IG, Van Cauwenberghe became a media spokesperson when she recognized the immense demand for financial information in Canada.

"Financial planners are seen as general practitioners that clients talk to about all the things happening in their lives, and they are expected to know the answers to all sides. It really highlighted for me how much hunger there was for information amongst both consumers and advisors."

"It was pivotal ... I saw the power of those disciplines in collaboration. It was an excellent way to ensure we were providing clients with holistic advice"

**2006**  
WRITES A BOOK



Having attained her financial planning designation, Van Cauwenberghe turned her attention to filling the void of helpful information for financial planners.

"I was often asked to recommend books appropriate for financial planners, so I started reading all of them to see which ones I could recommend, and nothing was really geared towards financial planners. As a result of that desperation, I ended up writing one. I took a client-centric approach."

**2007**  
STEPS UP



After doing several media interviews with the executive director of STEP Canada, the body that oversees the Trust and Estate Practitioner designation, Van Cauwenberghe was asked to help build the organization's educational program.

"STEP was emerging as the professional organization of choice for those in private-client markets. It was multi-disciplinary: lawyers, accountants and financial planners all advancing knowledge in their areas of expertise. The launch of the diploma program was my proudest achievement."

**2008**  
DEVELOPS AN INTERNAL COMMITTEE

Van Cauwenberghe broke new ground when she created an internal committee at IG that aims to prevent powers of attorney being used as a tool to facilitate financial abuse of seniors and vulnerable people.

"I started seeing a number of people using powers of attorney to attempt to gain access to their parents' accounts and a fair bit of financial abuse, and I realized we needed to develop policies we could enforce on a consistent basis."



**2018**  
BRINGS DISCIPLINES TOGETHER

As the current vice-president of tax and estate planning at IG, Van Cauwenberghe oversees another internal working group targeted toward high-net-worth clients.

"I wanted to participate in a process whereby every high-net-worth client would have access to all different advisors right away. We do an analysis on the front end and identify areas of concern; it's been a great experience."

