

# Investing Wisely

## MAKING YOUR HARD-EARNED MONEY WORK FOR YOU

growing up in Winnipeg, Charlene Birdsall never imagined that she would one day enjoy a challenging and exhilarating career in the field of finance and investments. In fact, it wasn't until after she graduated from high school at Pierre Radisson Collegiate and began working in an insurance company that Birdsall discovered she had a real knack for numbers. Once she made that discovery there was no turning back.

While still employed at the insurance company, Birdsall worked through the Certified Management Accounting program at the University of Manitoba and received the CMA designation in 2003. In 1998, under the mentorship of Walter Silicz at Wellington West, she became an advisor.

Since 2011, she has been an Investment Advisor and Portfolio Manager at National Bank Financial Wealth Management, a firm renowned for its cutting-edge technology and industry leading compliance.

As a licensed advisor and discretionary portfolio manager, Birdsall spends her days in the service of her clients, asking in-depth questions, reviewing financial portfolios, researching investment and tax saving ideas, searching for new opportunities for capital gains, and in general ensuring that her clients' financial houses are in order.

"I have the honour and responsibility to grow my clients' savings so they may reach their financial goals and have a comfortable retirement," Birdsall explains.

"My aim and focus is to make sure that all my clients' hard-earned savings work for them, as they have worked hard for these savings."

Birdsall's commitment to that goal stems largely from her own mother, Mary's, experience, working as a housekeeper and raising four children on her own.

"She had meagre savings in the bank that were not working

for her," says Birdsall. "I only wish someone in my capacity would have been able to discuss this with my mother, so her savings would have grown."

Birdsall's determination to ensure her clients reap the rewards of their hard work is counterbalanced by her determination to steer them towards ethical and responsible investing.

"Every day we are bombarded with articles about global warming, water scarcity, human rights abuses around the world, and government and corporate corruption," she says. "This can make it difficult and a bit scary to determine where we should put our investable dollars."

As one of only two Certified Responsible Investment Advisors in Manitoba, Birdsall provides investors with choices that comply with all environmental, social and corporate governance (ESG) standards — choices that ultimately will have a positive social impact.

"Ethical investing provides investors with peace of mind," she says, "and there is growing evidence that responsible investing reduces risk and leads to superior long-term financial returns."

And long term financial gains, of course, make both retirement and life in general, more comfortable. ■

**Birdsall is holding a RRIF/pension seminar in early June that is open to the public. For further information, contact her at 204-925-2252, 800-461-6314, or visit [charlenebirdsall.ca](http://charlenebirdsall.ca).**

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