

A New Era of Investing

Written by Jaime-Lynn Dyck - Photos Submitted

A quiet transformation is reshaping the financial landscape in Canada, and women are at the centre of it. By 2028, Canadian women are expected to control \$3.8 trillion in assets, a dramatic rise from \$2.2 trillion in 2019, according to CIBC World Markets. This shift marks more than just a financial milestone; it signals a broader cultural evolution in how women approach wealth, investment, and long-term financial independence.

Much of this change is being driven by the “great wealth transfer,” as baby boomer women increasingly inherit wealth from partners and family members who pass away. Statistically, women tend to outlive their spouses, and with that longevity often comes new financial responsibility, sometimes accompanied by stress, uncertainty, and a feeling of being overwhelmed. For many, their spouse was not just a life partner but also their financial partner, someone with whom they shared every decision. When that person is gone, the weight of those decisions can feel heavier than ever.

Robinson Canacade Private Wealth, Inc in Brandon, Manitoba, understands this transition. They’ve seen firsthand how complex and emotional it can be for women who suddenly find themselves making significant financial choices on their own. This is where their role, and especially the role of female advisors, becomes so important. Brandy Lavich and Tracy Baker of RCPW aim to step in as trusted financial partners, helping women navigate this new chapter with confidence, clarity, and compassion.

One of the most common challenges seen is that clients often feel “frozen” when they inherit wealth or receive a large sum of money. Whether it’s a life insurance payout or a substantial estate, the question becomes: what now? Should the money be used to pay down debt? Invest for future growth? Help adult children with their first home? Retire earlier than planned? These are deeply personal questions, and often the answers are not immediately clear. That’s





why the advisors at Robinson Cancade Private Wealth focus on having meaningful conversations, not just about dollars and cents, but about values, goals, and what matters most in life.

The advisors of RCPW also recognize that women tend to be more risk-aware, which is often mistaken for risk aversion. In reality, many women are willing to take on investment risk, but only once they fully understand the strategy and the potential outcomes. Education is a powerful tool, and they place a strong emphasis on ensuring their clients feel informed and empowered in every financial decision. Building knowledge builds confidence and that confidence can lead to a greater willingness to embrace the right level of investment risk for long-term growth. That's why Robinson Cancade Private Wealth partners with Cardinal Capital Management as their Investment Counsel — bringing expert insight and investment knowledge to every client relationship.

At Robinson Cancade Private Wealth, investing isn't just about accumulating wealth, it's about building a life that reflects your values and goals. For women stepping into financial leadership, whether by choice or by circumstance, they are here to provide guidance, support, and a clear path forward. With the right advice and a trusted partner by your side, your financial future can be not only secure but deeply meaningful.



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Robinson Cancade Private Wealth

WHAT WE DO:

- Wealth Management
- Retirement Planning
- Tax Strategy
- Risk Analysis
- Legacy Planning
- Charitable Giving

We provide clarity and freedom for our clients, ensuring they remain assured and empowered about their future by providing personalized investment and planning solutions, built on a foundation of mutual respect, to clients who are engaged in our process and value our expertise.

RCPW

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