Robert Lewkowitz
CSC, CPCA

Financial Planner / Certified Professional Consultant on Aging

◆ SERVICE ◆ PASSION ◆ GIVING BACK ◆

A popular bar and restaurant in London, ON, well known for its tongue-in-cheek humor, once hung a banner over its front door saying "It is my firm belief that if you look after the profits, the customer will take care of himself." While he appreciates the joke, Robert Lewkowitz is a Financial Advisor who clearly demonstrates the opposite to be true.

Robert has been in the financial industry since 1988. He joined the Royal Bank of Canada after obtaining an Honours Degree from the University of Western Ontario. With an interest in serving clients with a personal and comprehensive approach, he completed the Canadian Securities Course in 1988, and was accredited as a Financial Planner that same year. He is now also a Certified Professional Consultant on Aging. He founded his own firm, Lewkowitz Financial Inc. in 1996.

Pittsburgh retailer Katherine Barchetti once challenged businesses to make a customer, not a sale. Robert took this challenge to heart and based the foundation of his firm's philosophy and approach on extraordinary client service.

"We only have one focus and that focus is you," Robert says. "We help you define your deepest priorities and we welcome every opportunity to take a deep dive into your life. We need to understand your values in order to offer targeted and customized advice, even if that advice is counterproductive to our own financial interests."

Robert comes by his customer service approach honestly. His mother, Iveranda (Ivy) a Family Doctor, worked with patients until she was 81 years of age and only retired when she was required to look after his father Walter's declining health. His mother's patient focus was later reinforced by Robert's time at Ridley College, one of Canada's oldest and most prestigious private schools. The college has earned an excellent reputation for its emphasis on the highest academic and social standards for its students. Their motto, "Terar Dum Prosim" (translation: May I be Consumed in Service), reflects this. In retrospect, Ivy epitomized this motto, and Robert is following in her footsteps in this regard.

His father's family escaped Germany, for Israel, shortly after Hitler's rise to power, and later emigrated to Brazil for work as an Electrical Engineer, where he met Ivy while she was in Medical School. They then settled in St. Catharines, ON, in 1957 to raise their family. Robert comes by his strong work ethic honestly, having wonderful role models in his parents – for which he is eternally grateful.

These foundational values are evident in the way Robert and his team treat their clients, and in how he gives back to others who are less fortunate than himself. Clients appreciate not being looked at as a number or assets under management. "We have a personality minimum, not a dollar minimum," Robert says.

Peter Belec, one of the firm's satisfied clients agrees.

"As an older retiree with a modest portfolio, Robert and the team always treat me with the time, expertise and warmth as though I was their only client," Belec says. "They are extremely knowledgeable and are frequent with their communications regarding current financial and economic happenings in the country, continent and the world."

Members of the firm also spend a great deal of time on client education and look for ways to communicate for purposes other than investing.

"We want to ensure our clients have enough understandable information that they can assess appropriate risk and not react emotionally to news headlines or market changes," Robert says. "In fact, we focus on preparing clients to take advantage of market dips, rather than panicking."

Robert is ably assisted by an enthusiastic and experienced team. Kim Rumford has anchored the Lewkowitz Financial team since 1993 (Kim just celebrated her 25th anniversary as an employee of the firm). After earning her diploma in Marketing and Finance from Fanshawe College in London, Kim went on to earn her Mutual Funds license and her Certified Financial (CFP) designation. Kim is responsible for the efficient administration

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of all transactions, transfers, payments and problem-solving.

Yvette Woods has been with the team for 16 years, and is responsible for the office operations including scheduling meetings and managing all communications. Betty Parker has been with team for nine years. Betty is the in-house paperwork expert, ensures the accuracy of all client information for regulatory purposes and updates, and prepares all necessary documents.

"It's hard to connect to your clients from the 40th floor," Robert says. His team operates out of a comfortable heritage home in London. Client Jean Bagiere describes what it is like to work with Lewkowitz Financial.

"It's like having a trustworthy older brother/sister that looks out for you," she says. "From the first time I walked through their doors I felt genuine welcome and warmth from all the staff. They work well together and it shows. I trust them completely with my financial freedom and growth."

Client Mary B. Wheatley agrees.

"What I like the most, oddly enough, is all of Robert's staff – Yvette, Kim, Betty and, of course, Robert," she says. "They are awesome, so friendly as well as so professional and such fun to talk to as well as being totally sincere…On the business side, we like how our funds are as safely invested as possible with our personal situation taken into account. Robert is very down to earth as well, and tries to communicate on layman terms, which is greatly appreciated. We feel that he feels it is more important to do a good job for us over any profit for his business."

"Everyone at the office of Lewkowitz Financial are amazing," says Joan Hodges, another happy client. "I feel like they are a family and I am part of it. They are all so caring and not just interested in your personal investments, but are also invested in good relationships with their clients."

"I like to think that our commitment to client service is one of the reasons Lewkowitz Financial has many three, and even four generations of the same family working with us," Robert adds.

For he past two years Lewkowitz Financial has been chosen by Consumer Choice Awards as London's top Financial Planning firm. Also in 2017, the firm was recognized as the best financial boutique in Ontario by *Acquisition International* magazine. Robert is often approached by the media to give his opinion on a wide range of financial topics.

In his free time, Robert enjoys travelling and athletics. He is a marathon runner and has participated in the Boston Marathon and climbed Mount Kilimanjaro. He is also involved with multiple community and charitable organizations including Hope International Development Agency. The agency exists to improve the supply of basic human necessities for the needs of the developing world through self-help activities, as well as to challenge, educate and involve North Americans regarding development issues.

Robert and his wife Lori, a high school Physical Education teacher and coach, have been married for 15 years and have four children. Their oldest son Nathan, 23, is at college studying Finance. When Nathan was 18, father and son climbed Mt. Kilimanjaro together as a fund raiser for an orphanage in Moshi, Tanzania.

Their daughter Lindsay, 20, is in Northern Ontario fighting fires and their youngest daughter Marlo, 17, is at Carleton University studying Communications and Media Arts. Inheriting a passion for philanthropy, Lindsay and Marlo have done missionary work in Cambodia and recently joined Robert in Ethiopia.

Robert, Lori and Alex will be joining HOPE again on a trip to the Dominican Republic in July to oversee humanitarian projects under way. Their youngest son Alex, 10, attends Matthews Hall, a highly-regarded private school in London.

"We're all on this big blue marble together and no one is getting out of here alive," Robert says. "So we might as well do as much good for our neighbours as possible. It's incumbent upon those who are able, to do, serve and give."

Robert Lewkowitz is the President and Founder of Lewkowitz Financial and is a Partner and registered dealer representative at Equity Associates Inc. Equity Associates Inc. is a registered mutual fund dealer in select provinces.