



Robert McCullagh, CFP, CLU, CH.F.C., CHS

Financial Advisor, Benefit Planners Inc.



Robert started his career in the financial service industry over 35 years ago. In 1999 Robert became an independent broker joining Benefit Planners Inc. and has built a successful practice of individuals and families as well as business owners and entrepreneur clients. His range of expertise includes wills and estate planning, powers of attorney, trust, tax planning strategies, insurance, investments, succession issues and employee benefits while providing recommendations to achieve clients' overall goals and minimize tax. In 2011, Robert invested in and acquired his partner's practice. For 18 years starting in 1997, Robert taught the CFP program and other financial planning courses at Mount Royal University and the University of Calgary.

Industry involvement is very important to Robert who currently serves on the board of directors for the Conference for Advanced Life Underwriting (CALU). He has held several positions within the local Calgary Chapter of Advocis since 1992, including being President in 2004. Robert was an active member of the TFAAC Board of Directors and was Chair of the Board in 2011. He is a past chair of the Advocis Banff School. As a Life and Qualifying member Robert has maintained continuous membership in the Million Dollar Round Table since 2002 including two Court of the Table qualifications and is currently enjoying his second year of Top of the Table qualification.

Currently, Robert is Advocis' Alberta PAC Co-Chair and Advocis' Chair of the National Legal and Regulatory Policy Committee. Outside Industry involvement includes Co-Chair of the University of Calgary Insurance & Risk Management Advisory Board as well as Director of UniWater Educational Ltd.