



Jos Herman, CPA,CA,CFP,CLU,TEP

Founder of Resources & Solutions



Jos is a well sought out industry professional and lecturer with over 25 years of experience that is able to address asset protection, succession planning, philanthropy, and explain the tax efficiency gained in the insurance planning process.

At her boutique consulting firm, Resources & Solutions, she provides private business and personal solutions focused on tax concepts, tax efficient investment and insurance strategies, asset protection and wealth planning.

Her breadth of industry knowledge and wealth planning solutions has been a valuable asset to clients, fellow CPAs, legal professionals, and advisors.

Along with holding her Bachelor of Commerce degree, Jos proudly earned her Chartered Accountant designation from the Institute of Chartered Accountants of Alberta. Jos is a member of both the Chartered Professional Accountants of Saskatchewan and Chartered Professional Accountants of British Columbia. She has also achieved her Certified Financial Planners (CFP) designation and Chartered Life Underwriter (CLU). And proudly holds her Trust and Estate Practitioner (TEP) designation.