Gurjeet S. Rai, B.A., CFP

Estate Planning Specialist, Iron Financial Planning

With more than 18 years of experience as a Certified Financial Planner, Gurjeet excels in crafting tailored wealth management solutions for affluent families throughout Canada. His expertise dissects intricate private corporate setups to pinpoint tax and estate planning optimizations. By fostering a collaborative team environment involving his clients and their professional advisors, Gurjeet devises and executes sophisticated strategies aimed at minimizing taxes and safeguarding wealth.

At the helm of a boutique financial planning firm known for its professionalism, discretion, trust, and integrity, Gurjeet champions simplicity as the key to clarity. Through this straightforward approach, he ardently believes in untangling complex tax, estate, and legacy issues.

In his spare time, Gurjeet spends time with his wife and two kids, mountain biking, exploring nature, and travelling. Gurjeet currently serves on the board of directors for the Conference for Advanced Life Underwriting (CALU).