

# Delisle Advisory Group Shares Playbook to Launching Independent Wealth Management Firms

*Evolving client expectations are propelling many Canadian industry professionals to seek independence with Investment Counseling firms*

TORONTO, CA, UNITED STATES, January 17, 2025 /EINPresswire.com/ -- Delisle Advisory Group co-founders, Andrew Auerbach, Jean Blacklock, and Sandra Henderson, announce the launch of *The Wealth Management Entrepreneur: A Comprehensive Guide to Building Your Firm*, the definitive guidebook to establishing a Canadian investment counselling firm.

Sharing the expertise they have developed over the last two years of founding Delisle Advisory Group, Auerbach, Blacklock and Henderson note the process in Canada is complex and time-consuming.

"We're committed to contributing to the evolution of Canadian wealth management in any way we can. It is clear to us the industry is moving to boutique wealth management, and we hope to assist and encourage interested advisors to explore the benefits of independence," says Andrew Auerbach, Co-Founder of Delisle Advisory Group.

Since opening their own boutique wealth management firm in 2024, Delisle's success and prominence has attracted increased attention in the community.

"We've been inundated with requests for advice and guidance on leaving the traditional institutions and branching out." Andrew explained "Overwhelmingly wealth advisors are unhappy with the current system, and they can see the writing on the wall."

The *Wealth Management Entrepreneur: A Comprehensive Guide to Building Your Firm* dives into



Cover Of Guide To Boutique Wealth Management

the details of forming a Canadian wealth management firm and discusses in-depth the various requirements including regulatory, legal, marketing, financial, technology, and custody details.

“Even with our years of industry experience, Jean, Sandra and I found the process complex and time consuming. But providing Canadians wealth management options beyond the banks is an important goal we share, over and above our interest in establishing our own firm.”

The independent wealth management market in the United States has been - and continues to be - that country’s fastest growing market segment

“The independent market in the U.S. (called Registered Investment Advisors or RIAs) is the fastest growing channel in wealth management, with over 17,000 firms representing over \$8 trillion in assets.” says Sandra Henderson, co-founder of Delisle Advisory Group, “And we expect to see similar growth of independent firms here - we want to do our part to encourage this trend.”



Delisle Co-Founders Andrew Auerbach and Jean Blacklock

The Wealth Management Entrepreneur: A Comprehensive Guide to Building Your Firm is the first of its kind in Canada and the co-founders of Delisle are uniquely positioned to launch this guide.

“

Overwhelmingly wealth advisors are unhappy with the current system, and they can see the writing on the wall”

*Andrew Auerbach*

Andrew Auerbach brings over 30 years of industry experience, formerly leading full-service investing, private, commercial and retail banking at one of Canada’s largest banks. Jean Blacklock brings a novel background as a lawyer, proven entrepreneur, former wealth management executive and registered psychotherapist. She is the co-author of the national bestseller, *The 50 Biggest Estate*

Planning Mistakes and How to Avoid Them. Sandra Henderson brings over 30 years of executive experience in wealth management with leadership roles in both Canada and the U.S.

The guide is available online, free, at <https://delisleadvisory.com/ebook/>

About Delisle Advisory Group

Delisle Advisory Group is a discretionary investment counselling firm in Toronto, Canada, founded by industry leaders, Andrew Auerbach, Jean Blacklock and Sandra Henderson. Delisle's first priority is ensuring fiduciary standards are applied so as to always place clients' best interests first. Delisle serves high-net-worth and ultra high-net-worth individuals and families across Canada with a focus on fostering discussion in the families it serves on their values and goals related to wealth. Delisle Advisory Group understands wealth is not a number, helping clients define and achieve their purpose by looking beyond the numbers.

For more information about Delisle Advisory Group, visit [www.delisleadvisory.com](http://www.delisleadvisory.com).

Megan Boschoff

Invelop Entertainment

megan@invelop.com

Visit us on social media:

[Facebook](#)

[LinkedIn](#)

[Instagram](#)

---

This press release can be viewed online at: <https://www.einpresswire.com/article/777349884>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2025 Newsmatics Inc. All Right Reserved.