

John Moakler, BMath, CFP, CLU, CSC



Doctors & Dentists devote enormous amounts of their time and energy to the health of their patients. For that, we can all be grateful. But surprisingly, many doctors and dentists don't pay enough attention to their own affairs – especially when it comes to their finances.

John Moakler, a Financial Planner well known across North America, wants to rectify this imbalance. With a client list exclusively comprised of physicians, dentists, & business owners, this is his straightforward but ambitious vision: ***That every doctor and dentist in America will take as much care of their financial health as they do of their patients' health.***

Financial health is something that John understands intimately. After graduating from the University of Waterloo with a Bachelor of Mathematics and Computer Science, he spent 18 years in the high-tech industry – capped by building a software start-up and selling it to IBM for \$76 million. In the course of that transaction, he became dissatisfied with the financial advice he was receiving. So, he set out to become a financial planner himself.

As he puts it: "I know what I want to see when I'm looking for a doctor or dentist: Lots of letters after their name. That's why, when I decided in 2003 to become a financial planner, I added to my BMath by obtaining the Certified Financial Planner (CFP) and Chartered Life Underwriter (CLU) designations."

More about John

- BMath & Computer Science Degree from University of Waterloo and Business Minor from Wilfrid Laurier University
- Worked in the Hi-Tech Industry; in 1999 entered the "Start-up Software World"
- Software Start-up Company sold to IBM New York (2003) – **\$76M US\$**
- September 2004 joined a large Mutual Fund Company
- Corporate Speaker & Mentor to hundreds of Advisors from Nanaimo, BC to Halifax, NS and in the USA
- Interviewed by the Globe & Mail, Newstalk 1010, Zoomer Magazine, among other publications
- **Financial Planner of the Year Award** – 7 Consecutive Years
- President's Circle/Elite – 7 out of 10 years
- 2010 – Earned **CFP** (Certified Financial Planner) & **CLU** (Chartered Life Underwriter) Designations
- November 2013 – Left Mutual Fund Company to Start His Own Firm
- 2015 – Inaugural Member – **President's Circle 100** – Canada – Financial Horizons
- January 2016 – Book Release – **Heal Thy Wealth™** – Now a **Best Seller**
- August 2016 – Licensing to Advisors – **"The Wealthy Entrepreneur"™** Dinner Seminars Across **Canada**
- 2018 – **Elite Top 30** – Ontario – Financial Horizons
- 2018 to Current – **Advocis** – Financial Advisors Association of Canada – **President – Peel Halton Chapter**
- January 2024 – Licensing to Advisors – **"The Wealthy Entrepreneur"™** Dinner Seminars Across **USA**
- June 2025 – **Top 20 Dynamic Canadian Business Leaders** – The Canadian Corporate Magazine
- Passion – **Indoor Volleyball** – National Referee; International – **Invictus Games – Sitting Volleyball**
- 3 Children – Sarah, Michelle, & Justin