

Barry LaValley President, The Retirement Lifestyle Center

Barry LaValley is a special advisor to the Scotiabank Group, the President of The Retirement Lifestyle Center, and a leading educator and authority on the lifestyle transition to retirement for North Americans. Barry works with individuals, organizations, employers and associations to help them understand and plan for their retirement life. His list of clients has included several major financial institutions in both Canada and the U.S.

LaValley calls the retirement life phase “Prime Time” and has developed programs that will help aging boomers clarify their vision of the future. His company has provided retirement lifestyle planning education, workshop and printed material for the past ten years and he has spoken to tens of thousands of pre-retirees in his popular retirement planning workshops.

Barry has been an active researcher on the topic of retirement transition and has combined his research with a team of professionals on both sides of the border. His extensive work with pre-retirees has given him unique access to the concerns and issues faced by aging boomers as they look at retirement.

Barry received his education in Psychology at the University of Alberta in 1974 and entered the Canadian Financial Services industry in 1980. Since that time he has been an Investment Advisor, Senior Mutual Funds sales executive, writer and educator.

In 2000, Barry was named to the Retirement Education Committee of the National Endowment for Financial Education in the U.S. and helped author its report on communicating retirement issues to the general public. This document was considered one of the original outlines of the wealth management approach to client planning. He is also an instructor with the Certified Senior Advisor program in Canada and helps companies, business owners and individual advisors understand how to communicate more effectively with their aging clientele.

In 2002, Barry helped author the book “Your Clients for Life” along with U.S. authors Mitch Anthony and Carol Anderson. This book was designed to help advisors understand the life-transition approach to financial planning and how to help clients understand the financial implications of their life transitions such as retirement. He followed up this book with his own advisor book on the subject entitled “Put the Life into Your Practice” in 2005.

In addition to his retirement work, Barry is considered a leading authority on the wealth management approach for financial advisors and is a member of the advisory board for the Canadian Securities Institute. He teaches wealth management communications and marketing for the Institute in both Canada and Mainland China.

Barry LaValley is currently on exclusive contract in Canada with Scotiabank Group of Companies as their retirement consultant.

Barry lives in Nanaimo with his wife Melissa and son Peter.

