



THRIVOS
CONSULTING

Erin
WILSON

**COO & PRACTICE
MANAGEMENT CONSULTANT**

Erin has spent the past 20 years in financial services serving clients and advisors in a variety of critical capacities. She started her career as an assistant to a financial advisory team.

For the past 10 years she has served as a portfolio construction specialist for a major Canadian asset manager, working with over 400 advisor practices ranging in size from \$20 million to \$1 billion to bring capacity and discipline to their business. She has a speciality in investment and portfolio management systematization. During her time working on portfolio management systems Erin earned her Certified Investment Management Analyst (CIMA) designation from the Investments and Wealth Institute.

She joined Thrivos in 2020 because she has watched clients and "the business" evolve and change, and believes that the financial services industry needs to provide advisors with the tools to evolve with it.

She believes in on-going learning and below are a just a few of the courses she has completed throughout her career outside of investment management: Coaching and Change, Neuro Linguistic Programming, Words That Change Minds, Mastering Influence, and Sleight of Mouth. If you are interested in how she came to some of her beliefs, ask for her book recommendations.

In her personal time Erin can be found at OrangeTheory, cranking out some watts on her spin bike, or out on the road when the weather is nice.

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