

ISSUE XIV | FALL 2022

OCEANFRONT NAVIGATOR

Our seasonal lifestyle newsletter focuses on finding fulfilment in our daily lives and optimizing our **Return On Life™**.

**SUSAN
& MARK
NEALE**

Adventurers at **heart!**

**GET TO KNOW OUR
MANAGER OF
OPERATIONS & HR
CASSIDY BOULT**

See how Kris Jantsch makes the most out of his free time!

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OCEANFRONT

WEALTH INC.

**"A FALLEN
LEAF IS
NOTHING
MORE THAN
A SUMMER'S
WAVE
GOODBYE."**

-UNKNOWN

In our **Fall 2022** edition of OceanFront Navigator we are delighted to feature our clients **Mark and Susan Neale** and share their unique and successful life journey toward a happy and financially secure retirement.

We will also feature a team story on our Wealth Associate at OceanFront Wealth Inc., **Kris Jantsch** and his exciting West Coast adventures.

And lastly but certainly not least, we'd like to shine a **SPOTLIGHT** on Manager of Operations and Human Resources at OceanFront Wealth Inc., **Cassidy Bolt**. Her role and what she does to maintain balance outside of the office.



In this Fall 2022 edition of **OceanFront Navigator**, we are delighted to feature our clients **Mark and Susan Neale** and share their wanderlust as they ease into retirement.

Mark retired in 2021 after **a successful 38-year career as an executive in the financial services industry**. In addition to providing his clients with sound financial planning advice, Mark helped mentor new and upcoming financial advisors which he found very rewarding. Susan retired from **a career in**

"Mark and Susan decided to pull their son out of school for a year and travel the world."

journalism where she produced radio talk shows in Vancouver. She left the position because she felt the industry was changing due to the growing influence of social media and was therefore no longer fulfilling.

Mark and Susan have a 13-year-old son named Cooper. **Now 64 years of age, Mark considers himself an older dad**, having had his son when he was 51 years old. Not knowing what they wanted to do next in life, and the fact that Cooper was growing up far too quickly, Mark and Susan decided to pull their son out of school for a year and travel the world.

The purpose of the trip was to spend time with family, explore and **contemplate the next phase of life**. It would give them a time of pause, to reflect on their lives and accomplishments. Given that the couple had worked for a long time, they believed this journey would serve as a transition, revealing what they wanted to do, and where they wanted to live.



Susan & Cooper

They also wanted to provide their son with exposure to other cultures and languages. Cooper attended a French immersion school for eight years but had never traveled to a French speaking country.

So, they rented out their home in North Vancouver to insurance companies seeking short-term rentals to help people who are between homes due to fire damage and other unforeseen circumstances. Mark and Susan agreed this was a great way to help finance their trip around the globe.

The adventures began in January 2022



Wakeboarding Camp in Portugal

They spent the month of January 2022 in BC, deciding to stay local for a while due to the lingering effects of the pandemic, and enjoyed skiing and snowboarding. **In early February the family went to Costa Rica for six weeks**, experiencing the beaches, surfing, river rafting and zip-lining in the jungle.

They even climbed a 100-foot Ficus tree from the inside!

Then it was time to go overseas. They left Costa Rica for the Iberian Peninsula, arriving in Spain and experiencing what that amazing country has to offer, and **then traveled on to Portugal where Cooper participated in a wakeboarding camp**. During that time, they met a wonderful Russian man named Alex, who moved to Portugal with his family in search of a better life. Cooper greatly enjoyed the opportunity to converse with Alex's Russian-speaking children.

100-foot tree in Costa Rica





“The entire Bali experience made an indelible impression on the family.”

The family spent their time in beautiful Aix en Provence and Avignon for a month. After that, it was on to fabulous Paris, one of the most beautiful cities in the world. The final stop on their global circumnavigation was exotic Bali, Indonesia. They stayed in several interesting places, including Villa Selina on the northeast coast of Bali, which boasts gorgeous bungalows right on the beach. **This property had not had guests for over two long years due to the pandemic** and the hosts were extremely grateful and welcoming. Combined with the incredible local cuisine, the entire Bali experience made an indelible impression on the family.

Mark and Susan are adventurers at heart, both being fit and active with abundant energy and enthusiasm for life.

They view time as a precious commodity and realize that **sharing quality experiences with each other is of the utmost importance.** They are now focused on raising their son and enjoying a great deal of family time at their Brighton Beach cabin in North Vancouver. They are also considering acquiring another home on a larger property where Susan can enjoy gardening and exercising. **The family is now assembling a list of what is really rewarding to them, which will help determine their next activities and adventures.**

We thank Mark and Susan for sharing their life journey toward financial freedom with us. This kind of **'Return on Life™'** is what we seek to help our clients achieve.



KRIS JANTSCH

Getting the most out of life!

Kris Jantsch, Wealth Associate at OceanFront Wealth Inc., recently returned from an exciting jaunt with friends to **Secret Cove**, British Columbia. This sheltered harbour north of Sechart on the Sunshine Coast is a popular resort retreat with a secluded feeling of being on an island. Kris loves to fish, and Secret Cove boasts some of the best sport fishing in British Columbia.

He also spent lots of time on the sunny beaches of **Thormanby Island** in the Strait of Georgia, exploring little hidden coves and swimming in the pristine ocean.



On the August long weekend, Kris and his partner Brianna, decided to take **a road trip down to Oregon** to explore the beautiful city of Portland. It was Brianna's birthday, so it was a perfect opportunity to make the trip extra special by also visiting the magnificent Oregon coast, including Cannon Beach. They had a wonderful time and experienced the local cuisine, craft breweries and even had a go at some decadent doughnuts!



Cassidy & her daughter

SPOTLIGHT

CASSIDY BOULT

Manager of Operations & Human Resources

Cassidy Boulton is Manager of Operations and Human Resources at OceanFront Wealth Inc. In her role she works to identify and nurture each team member's unique skills and strengths which enhances the firm's ability to provide exceptional client service. Cassidy returned from her second maternity leave in January 2022 and has spent the year relearning to balance the demands of work and home life. Based on her unique perspective, she says **"I feel passionate about sharing with others my experiences as a mom of two and dedicated career person.** Despite common beliefs that it isn't possible, I think women who desire to pursue both family and career are able to successfully accomplish both if you have a strong support network and an understanding workplace. I always knew I wanted a career and a family, and while I feel that staying home with kids is a beautiful experience, I very much need the fulfillment and change of pace my career provides me with."

Cassidy loves her job and enjoys the challenges it presents each day. **"I work with the most amazing team of colleagues I could ever**

imagine, and they are instrumental in making my experience a positive one with respect to work. Every day I walk through the doors at OceanFront I feel grateful to be here as a part of that worthy enterprise. I get great satisfaction in finding solutions to problems that maximize the firm's ability to meet client needs. We offer something unique to our clients, in that our Advisors care deeply about them, and that kind of dedication inspires me in my role and life in general."

Beyond work, Cassidy likes to recharge at the end of a busy week by getting outside to enjoy gardening, hiking trails on Burnaby Mountain and taking family trips with their trailer, which includes roasting marshmallows over the fire with their two young children. She and her partner Tycson also love to entertain and spend a lot of time with close friends, experiencing new kinds of food and drink, and trying new and interesting wine pairings. They are looking forward to a season full of outdoor experiences, cozy nights in with friends and a renewed sense of focus on personal and professional goals.



THANK YOU

We hope you have enjoyed our fall edition of the Navigator featuring **Mark and Susan Neale** and their exciting journey into retirement.

We look forward to connecting with you in our next edition of the Navigator.

Thank you sincerely and cheers to the future we create together!