



**Shawn Brayman**  
**President & CEO, PlanPlus Inc.**

Shawn Brayman is the founder and president of PlanPlus Inc., a private Canadian company that has specialized in providing investment planning and financial planning solutions to financial advisors for more than 25 years.

Shawn completed the Chartered Financial Planning program in 1997 and has been working with financial planners around the globe, gaining a unique perspective on common challenges experienced by individual practitioners and large financial institutions that implement advice driven sales channels. Having worked with firms in North and South America, the Caribbean, Asia and Europe – both experienced planning organizations and firms in the initial stages of introducing financial planning – has provided Shawn with a unique understanding of this industry and emergent profession.

In 2003 Shawn and others helped to draft the “*Financial Planning Best Practices Guide*” Canada’s first comprehensive best practice manual.

In September 2013 Shawn was elected to the Board of Directors of the Financial Planning Association (FPA), Denver, CO. The FPA is the largest association of professional financial planners in the world with over 23,000 members from about 40 countries. Shawn has served as Chair or Board Liaison for the Global Advisory Committee for a number of years, and has been active on various other committees and task forces including the Global Academic Community.

In 2015 Shawn and the PlanPlus team were selected by the Ontario Securities Commission, Investor Advisory Panel, to head up a research project on “[Current Practices for Risk Profiling in Canada and Review of Global Best Practices](#)”.

Shawn is a frequent speaker at industry events on topics of technology, financial planning best practices, research, and practice management. He has presented to audiences both large and small in Canada, USA, UK, Netherlands, Hungary, Russia, Hong Kong, Japan, Singapore and Malaysia. Shawn brings a unique combination of technical, business and financial planning knowledge to any audience.

Shawn has remained active in the research field covering a wide range of topics and peer-reviewed papers.