

Wise Planning Corp Announces Integrated Financial Planning Approach

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Richmond, BC - September 10, 2026 -
Wise Planning Corp has announced an integrated approach to financial planning and insurance support for individuals, families and business owners in Richmond and throughout the Greater Vancouver area. The approach is intended to help clients consider insurance protection, retirement preparation, tax-related planning questions and long-term financial priorities within a more coordinated planning conversation.

The company said the announcement reflects a growing need for clearer support as clients balance family responsibilities, business obligations, tax considerations and changing financial circumstances. Rather than treating each question as an isolated transaction, Wise Planning Corp is organizing its client conversations around the connections between immediate protection needs and longer-term goals.

Jessie Li, founder of Wise Planning Corp, said clients often begin the process with more than one concern. "A family may be thinking about protection, retirement timing and the financial impact of a changing household at the same time," Li said. "The purpose of a structured planning conversation is to help clients understand their

options and make decisions in an organized, practical way."

Li is a licensed insurance consultant with an accounting background. The company states that she holds CFP credentials and has received MDRT/TOT recognition, reflecting her professional experience in insurance and long-term planning discussions. Wise Planning Corp said its role is to help clients review available options and understand how different insurance and planning decisions may relate to their individual circumstances.

The firm provides support across life insurance, critical illness insurance, health insurance, travel insurance, general insurance and commercial insurance. Through Wise Planning Financial Solutions, the company helps clients evaluate how protection planning can fit with retirement preparation, household responsibilities, tax-related considerations and broader financial objectives.

Wise Planning Corp's planning approach is supported by its affiliated CPA firm, Michael Gao Inc., a Richmond-based accounting practice founded by Michael Gao, CPA. Together, the two firms offer clients a combined Richmond CPA and insurance advisor resource, bringing tax and insurance perspectives into the same planning process. The relationship allows clients to consider insurance protection, retirement preparation and tax-related planning questions through a more coordinated process.

Michael Gao Inc. provides support across personal and corporate tax filings, GST/PST/HST matters, bookkeeping, overseas asset reporting, non-resident tax matters and tax considerations for business owners and families. Wise Planning Corp said this tax-aware perspective adds context to planning conversations where insurance, retirement, family obligations, business responsibilities and long-term financial decisions may overlap.

For individuals and families, the process may include reviewing current coverage, recent life changes and future planning priorities before deciding what type of support may be appropriate.

The company noted that planning needs can change over time, particularly when clients experience a career transition, a new family responsibility, a business change or a shift in retirement expectations. Its integrated approach is intended to give clients a consistent process for revisiting relevant insurance, tax and financial questions as circumstances evolve.

Wise Planning Corp said its planning conversations begin with the client's stated priorities and the information needed to understand the situation. The firm then helps clients identify questions for further consideration and the type of professional support that may be relevant, while recognizing that legal, tax and investment matters may require advice from appropriately qualified professionals.

Business owners may have an additional set of considerations, including continuity planning, insurance

protection, employee-related coverage, corporate tax matters and succession planning. Wise Planning Corp said its approach is designed to give business owners a clearer starting point when personal financial priorities and commercial responsibilities overlap, while keeping decisions within the appropriate professional scope.

The company also noted that clients frequently delay planning because they are unsure whether their first concern relates to retirement, insurance coverage, tax matters or a broader financial question. Wise Planning Retirement & Insurance is the company's framework for making those services easier to understand and for helping clients identify the next practical conversation to have.

Wise Planning Corp will continue to provide financial planning and insurance support throughout Richmond and the Greater Vancouver area, helping clients seek greater clarity around long-term protection and financial priorities. For more information, visit https://wpcins.com/en/.

About Wise Planning Corp:

Wise Planning Corp is a Vancouver-area financial planning firm helping individuals and families approach insurance, retirement, and long-term planning with greater clarity, confidence, and a more complete financial perspective.

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Wise Planning Corporation

Wise Planning Corporation provides wealth management, investment, and insurance services. Founded in 2010 by CFP-certified Jessie Li, we partner with top Canadian insurers to manage your finances with the highest ethical standards.

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