



GENERATION
PRIVATE WEALTH



HARBOURFRONT
WEALTH MANAGEMENT



MARK BERTOLI

MEDIA KIT

generationprivatewealth.com

Mark Bertoli

Senior Investment Advisor &
Insurance Advisor

Mark Bertoli is a Senior Investment Advisor & Insurance Advisor at Generation Private Wealth - Harbourfront Wealth Management. Mark is a recognized leader in the financial services industry. His leadership has built a team that has received national recognition for excellence in wealth management, client service, and industry innovation.



Generation Private Wealth is a leading Advisory Team driven by two missions; to improve lives and to raise the bar in the financial services industry. By simplifying complex financial decisions through comprehensive wealth management and holistic planning, Generation Private Wealth helps clients build, preserve, and transfer wealth with confidence and peace of mind.



Speaking Topics

Investment Discipline

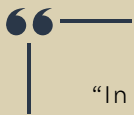
Insights on fundamental principles of investing to help you build wealth in the everyday, so you can focus on living well.

Business Sucession

Strategies for reducing complexity through holistic planning for the future of your business and impacts on family and personal estate plans.

Value-Driven Business

Exploring why having a process grounded in mutually-aligned values matters more for your clients than you realize.



“In the financial services industry it can be tough to communicate ideas around money, investing, and finance. Mark has a knack for taking those topics and reinventing ways to share them through a simple, common sense, and refreshing approach. That leads to clients being more knowledgeable, comfortable, and successful.”

- Jerrod Falk, Investment Counsellor, Value Partners Investment

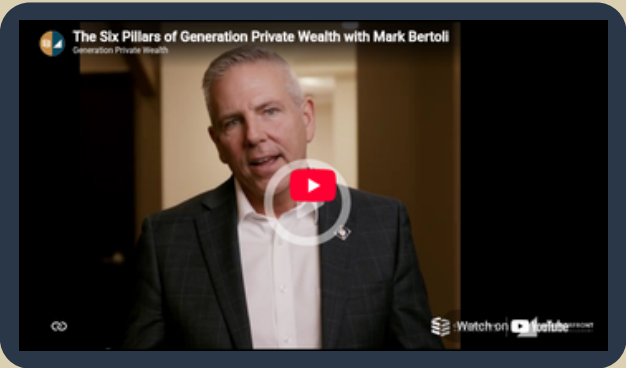
“Mark is a very community minded member of the Kamloops wealth management network. He is always looking to give back, and he is very enthusiastic about strategizing with different groups to make sure that donors or potential donors are thinking about maximizing their legacy planning. It's been very rewarding to collaborate with Mark as I always learn a lot from him.”

- Heidi Coleman, CEO, Royal Inland Hospital Foundation

Mark Bertoli shares Generation Private Wealth's commitment to improving lives through holistic planning that reduces stress and brings clarity to life's most important decisions.

Watch the full video here:

- [The Six Pillars of Generation Private Wealth](#)



Speaking Engagements

Year	Event	Role	Topic
2024	CFJC Midday	Presenter	The value of advice in financial planning
2023	HWM Annual Conference	Presenter	Holistic Planning from a 6 Pillar Perspective
2023	VPI Semi-Annual Conference	Presenter	We Improve Lives
2023	TRUSIF Speaker Series	Presenter	Hands on approaches to corporate and estate planning
2023	CFJC Midday	Presenter	The holistic approach to wealth management
2022	TRU Foundation	Guest Presenter	Estate Planning Seminar

Awards & Recognition

Mark Bertoli's leadership at **Generation Private Wealth** has **lead his team to been recognized across Canada** for raising the bar in the financial services industry. His work has contributed to Generation Private Wealth receiving major awards, including:

2026	Wealth Professional - Holistic Advisory Team of the Year
2025	Kamloops Chamber - Business Excellence Innovation Award
2025	Kamloops Chamber - Business Excellence Service Provider 1-10 Staff Award
2024	Wealth Professional - Most Innovative Use of WealthTech
2024	Wealth Professional - Charitable Impact Award in Excellence in Philanthropy and Community Service
2023	Kamloops Chamber - Community Service Award

Book Mark Bertoli for your next conference or event to gain insights into holistic wealth management approaches.

Generation Private Wealth
Media Contact: Kayla Edge

- info@generationpw.com
- 1.877.922.2688
- generationprivatewealth.com

