



Building a Career Through Integrity:

Filomena May's Mission to See Her Clients Succeed

Courtesy of **Filomena May, CIM®**, Expert Contributor & Senior Wealth Advisor

“I believe in persistence and never giving up, and it's tough if we say so.”

Filomena May is the founder of Filo Financial Solutions, operating under Raymond James Ltd. With over 23 years of experience, Filomena holds the title of Senior Wealth Advisor. She has also completed her Chartered Investment Manager (CIM), a distinguished designation. Her determination to offer nothing but the best for her clients has driven her to seek continuous education throughout her career. At a young age, her entrepreneurial vigour led her to start her own independent practice – Filo Financial Solutions - now an independent branch of Raymond James Ltd., which operates across Canada and includes alliances within the firm that offer U.S. cross-border financial services and planning.

Filomena provides comprehensive services for both individual and corporate clients, including but not limited to, complex tax and estate planning, investment advice, retirement planning, cash flow analysis and insurance strategies. She emphasizes a customized approach and crafts unique financial roadmaps that are aligned with her clients' values and goals. Filomena's competence, paired with her empathetic nature, offers clients peace of mind.

When Filomena began her career in 2002, she entered a male-dominated industry, where only five per cent of advisors were female. Today, that number has scaled to roughly 15 per cent. Although Filomena boasts a resume that could leave her male peers striving to keep up with her, she does admit that it has been challenging, especially in her early days, to prove herself in the field. She stayed the course, building her career through two pregnancies and raising young children. Her motto is, “I believe in persistence and never giving up, and it's tough if we say so.”

Ever humble, the successes she has acquired and the challenges she has faced have fueled her to advocate for women in the industry. Filomena has become known in her community as an advocate for women outside of the industry as well. She has helped many women through divorce planning, often acting as an intermediary between professionals involved, such as lawyers and accountants. While generally dealing with high-net-worth clients and complex investment and estate planning, Filomena advises clients from all walks of life. She thrives on seeing other people win and hopes to be a voice for her clients, empowering them to succeed. Her attention to detail, level of care, and impressive credentials enable her to assist her clients in making sound decisions.

Filomena is passionate about educating through multiple channels. She is a contributing author, an international speaker, and has appeared on BNN, CTV and The Wealthy Life show. Filomena has also been featured in “Best of The KNOW Global,” highlighting her influence and recognition in the industry.

Filomena is also an ardent philanthropist and flourishes when she is giving back to her community. She is involved with various charities, raising funds and awareness. She is also the president of a non-profit community group, reflecting her commitment to community engagement and cultural preservation. Filomena is also involved in initiatives to inspire excellence with Calgary youth.

Need guidance or clarity? We're here to help.

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