

Meet

# ALLAN MCDONALD

**Marketing Director, Manitoba, Customplan Financial Advisors Inc.**

Allan McDonald entered the financial services industry in 2020, driven by personal experiences with financial mismanagement. Since joining Customplan in 2022 as a financial advisor and Marketing Director, Allan has applied over a decade of diverse experience—including roles as a tradesman and Canadian Armed Forces member—to deliver practical, well-rounded financial planning. Allan conducts workshops on budgeting and expense management. His expertise lies in assisting individuals, small businesses, and corporations with investment and insurance planning.

Allan is passionate about enhancing financial literacy through education and personalized service. His no-pressure approach fosters trust and empowers clients to achieve financial independence. Continuously learning, he stays ahead of financial trends to provide up-to-date, effective guidance. Beyond work, Allan enjoys golf and Brazilian Jiu-Jitsu training on weekends.

Contact Allan directly at  
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**CUSTOMPLAN**  
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Office Hours: Monday – Friday  
8:30 AM – 4:30 PM



**MEET THE  
CUSTOMPLAN  
WINNIPEG  
TEAM:**

**Allan McDonald,  
Marketing Director**

**Dan Steinkey,  
Managing Partner**

**Kelly Wilson,  
Administrator**

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**Local, Independent,  
Back-Office Supported  
MGA**