



2011 CIBPA PROFESSIONAL AWARD



CHARLIE AIELLO FAMILY VALUES

As a successful investment advisor and wealth manager, Charlie Aiello certainly understands the concept of risk and reward. For Charlie however, the true definition of the term is reflected in a lifetime of striving to balance his career with his family.

“My father taught us from an early age that while money may give you unlimited options, you’ll never be truly happy unless you have a life outside work,” explains Charlie. “There are plenty of financial rewards in the work I do but there’s great risk too if you don’t make time for family.”

To that end, Charlie is not only building a thriving financial planning business, he and his wife Pina are raising their daughter Samantha and sons Peter and Franco in a way that would make any Italian nonno and nonna proud. “Italian families love to get together to celebrate life and we’ve tried to raise our kids in that tradition,” states Charlie. “From my own experience, I’m closer to my cousins than many Canadians are to their own brothers and sisters.”

Familial responsibility was ingrained in young Charlie by his mother Yolanda and father Peter, who emigrated from Italy in 1965. Their young family included five-year-old Pasquale, soon to be called Charlie by his Canadian friends. Always a high achiever with a desire to be successful in business, Charlie found his calling at Wood Gundy (now CIBC Wood Gundy) in 1987. Apart from a short stint at another company, Charlie has worked exclusively at the downtown Winnipeg firm. It’s been a lucrative business, but as Charlie says, what satisfies him most is knowing that he’s building peace of mind for the people who entrust him with their financial futures.

“When I started in the financial planning industry my goal was to be a top producer but I realized that far beyond being recognized as the best, I got the most pleasure out of helping my clients meet their goals,” he says. “It’s great to be in the position, almost 25 years later, to see that what we put down on paper back then is now coming to fruition.”

To Charlie the values inherent in family have made it easier for him to succeed in business. The advice he received from his father so many years ago – work hard but enjoy life – has served him well.

“Very early on in life I learned to take responsibility for everything I did,” he says. “This made me understand that your reputation is worth as much as all the money in the world. I’m most proud of the references I get from my clients and my business associates.”

At the heart of Charlie’s ongoing success is his day-to-day reliance on the principles he learned at a young age. He says his Italian heritage has shaped the way he goes about conducting business.

“Loyalty is very important to Italians. I’m very loyal to my family and I’m also loyal to my assistants and my clients. I treat them like family.”

Charlie Aiello knows there’s great risk in living an unbalanced life. By focusing on family, he stays true to his roots and that on its own is enough reward.

by Bernard Kruchak

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