



49TH PARALLEL WEALTH MANAGEMENT

You Are More Than Your Finances

*Financial planning that honors the person first —
at every stage of life, and in every place you call
home.*

We believe people come before profits.



CLIENT-CENTRIC. ALWAYS.

True wealth extends beyond money.

You are a person with a story, values, relationships, and purpose. True wealth reaches far beyond money—it includes dignity, well-being, and the ability to live each day with meaning. Before we discuss a single number, we take time to understand the life those numbers are meant to serve.

We believe that caring for yourself is what allows you to care for the people who depend on you. Financial planning should support the life you are living today, prepare you for the transitions you will face tomorrow, and protect the legacy you hope to leave behind.

While numbers matter, they are not the whole story. Fulfillment, peace of mind, and happiness weigh as heavily as performance and outcomes. Wealth is not only about reaching a goal—it is about navigating the journey with clarity, intention, and respect.

At every stage of life, and in every place you call home, thoughtful planning should honor the person first.

CLIENT-CENTRIC. ALWAYS.

How we work

This is more than a phrase—it is our practice. We listen before we advise. We build plans around your whole life, not just your portfolio. And because we practice on both sides of the border, we help you move between two countries' systems—tax, retirement, healthcare, and estate—without ever losing sight of what you want your money to actually do.



Lucas Wennersten

CFA & CFP® (Canada & U.S.A.)

*He didn't learn cross-border
planning from a distance—
he lived it.*

Crossing the 49th Parallel himself, Lucas understands firsthand how complex and emotional a move can be. Leaving behind family, long-standing friendships, familiar routines, and a sense of place is never simple. Even when the move is “just across the border,” the cultural shift can feel profound—customs, systems, expectations, and daily rhythms change in ways that are often underestimated.

That experience brings a deep respect for what clients carry with them when they relocate. Moving is not only a logistical transition; it is a personal one. It involves identity, belonging, and the challenge of building something new while honoring what was left behind.

Yet within that challenge there is also beauty. Moving opens perspective. It expands understanding, resilience, and empathy. Living on both sides of the border has shaped Lucas's ability to see situations through multiple lenses—recognizing nuance where others see only rules or structures.

This lived experience, combined with years of professional cross-border expertise, equips Lucas to understand his clients beyond spreadsheets and tax forms. He knows that no two journeys are the same, and that planning must reflect not just where someone is going—but where they have been.

Alongside a dedicated and experienced team, 49th Parallel Wealth Management brings depth of understanding to the many walks of life its clients take—meeting people where they are, whether they are navigating change, seeking clarity, or building confidence in an unfamiliar place.

*At 49th Parallel, crossing borders is not just about geography. It is about understanding people, honoring their journeys, and guiding them forward with **care, perspective, and respect.***

Wherever your story began, and wherever it is headed next, our role is the same: to help you cross with confidence—and to make sure the plan always serves the person first.

CONTACT US

Begin with a conversation.

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