



**Allan Wiekenkamp, CPA, CA, CFP, TEP**

Chief Financial Officer & Founding Partner

Allan is an entrepreneur and an accomplished builder of people-focused financial service businesses. As a founding partner, his pioneering spirit instilled a culture of innovation and growth into Meritus. With more than two decades of experience with private clients, Allan is skilled at working with ultra-high-net-worth families and their complex structures and investments. Before Meritus, Allan was the Managing Director (and founder) of FORS Limited (Family Office Reporting Services), a provider of accounting and investment reporting services to private clients, family offices, and trust companies globally. He received his management training with Ernst & Young Bermuda, Private Client Services team.

**Allan's Credentials**

- Member of the Chartered Professional Accountants of Canada
- Member of the Chartered Professional Accountants of Bermuda
- STEP Trust & Estate Practitioner (TEP) designation with honours 2005
- Certified Financial Planner
- Bachelor of Science degree

**Allan's Accolades**

- Early Achievement Award from CPA British Columbia 2010
- STEP Bermuda First Overall Bermuda TEP diploma scores

**Allan's Honours**

- Board member and treasurer of Vancouver Island University Foundation
- Past chair and board member of Vancouver Island University
- Past treasurer and board member of Innovation Island Venture Accelerator
- Past treasurer and board member of STEP Bermuda

