

Speaker, Author, Host Duncan MacPherson

Duncan MacPherson is a best-selling author, speaker, business coach, podcast host, and CEO of Pareto Systems, a practice management and business development consulting firm that partners with financial professionals and forward-thinking financial institutions.

For more than 30 years, Duncan has helped advisors professionalize client relationships, improve operational efficiency, build referable client communities, and create businesses that are not only profitable, but purposeful. His work is rooted in proven best practices and the principles behind *The Blue Square Method*, helping professionals align their business with their values, strengths, and long-term aspirations.



"Busy doesn't mean productive. Productivity comes from having a plan and a process and the ability to communicate that to clients."

As an in-demand speaker, Duncan presents throughout North America and internationally, delivering practical, insight-rich sessions that resonate with advisors, wholesalers, enterprise leaders, and financial institutions. His ability to demystify business development, client engagement, and practice management has made him a respected voice in the industry.

Duncan is the author of several books, including *The Advisor Playbook* and *The Blue Square Method*. He is also host of the *Always On Podcast for Financial Advisors*, where he speaks with business leaders and experts about personal and professional plateau avoidance.

At the core of Duncan's work is a simple objective: to help financial professionals achieve greater liberation and order through disciplined execution, proven methodology, and a business-by-design mindset. Beyond the office, Duncan enjoys spending time with his wife and two sons in Kelowna, British Columbia, where he takes full advantage of the region's four-season lifestyle through golf, tennis, pickleball, skiing, and other recreational pursuits.

