TD Wealth

Simplifying Your Estate Planning Needs

The Bird Moore Advisory Group will be your single point of contact supported by the vast resources of other TD specialists, bringing you expertise, experience and answers you need. We will collaborate with you and your trusted professionals to create your unique investment and wealth plan.

Mark Rogers CLU, CHS
Estate Planning Advisor
Wealth Advisory Services

With over 25 years of experience, Mark works closely with our team and our clients to provide professional advice in the areas of wealth transfer and estate planning for individuals, business owners and professionals. Mark's expertise is to crystallize and communicate financial planning issues, concepts and solutions for clients, and their other professional advisors. He specializes in working with high-net-worth clients to implement tax effective solutions that assist with the accumulation, preservation and transition of their wealth and will ensure that any strategies proposed will complement their overall investment and wealth plan.

As an experienced insurance professional, Mark is able to provide unbiased, objective solutions to suit each client's unique situation. He offers sophisticated planning strategies designed to preserve the integrity of our clients' estates and offers effective insurance solutions for both personal estates and business owners.

With a commitment to community and technical development, Mark is engaged in industry, consumer and professional advocacy roles. He is a past Faculty member for The Financial Advisors Association of Canada (Advocis) and an active member of the Conference for Advanced Life Underwriting (CALU). Prior to joining TD, Mark operated an independent planning practice and has earned the professional designations CLU (Chartered Life Underwriter) and CHS (Certified Health Insurance Specialist).

Bird Moore
Advisory Group

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