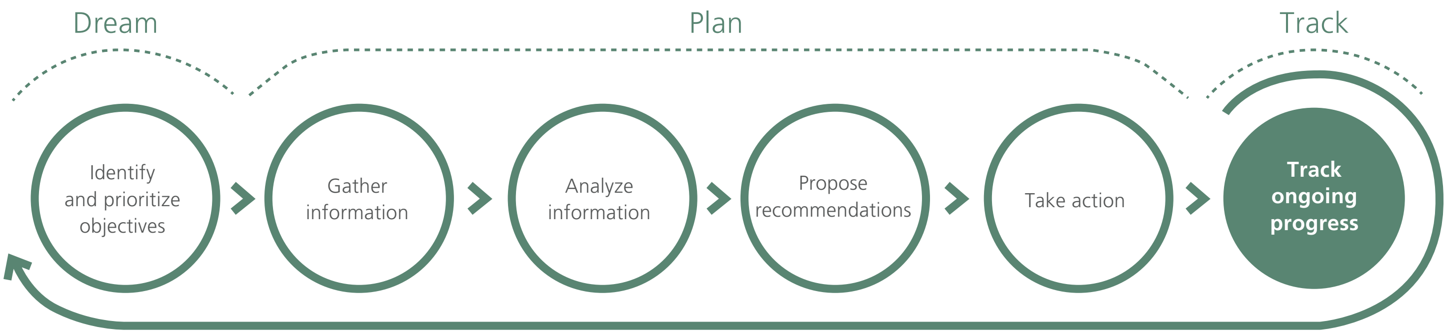
TD Wealth

Our Wealth & Investment Planning Process

We believe your unique vision should guide your wealth and investment plan. Our ongoing process helps us meet your unique needs as they change over time. We stay close to you and your life so that we are in tune with changes in your financial circumstances, investment goals, personal situation and vision for the future.



Dream – It starts with an understanding of your vision.

Our in-depth discovery meetings will give our team a thorough understanding of you and your vision. We become familiar with not only your finances, but will also explore your needs, visions of success, and your family's unique circumstances.

Plan – We start with a solid foundation to build your wealth.

We will gather all relevant financial information and documentation, so that we can understand the complexities of your financial picture. After thorough review and analysis, we prepare a comprehensive wealth and investment plan to guide us to your goals. Together we will help you define your specific goals and objectives, establish priorities and set time frames for making progress towards them.

We structure our recommendations based on your unique priorities.

- Investment Planning
- Cash Flow Planning
- Liquidity
- Asset Allocation
- Tax and Estate Planning
- Retirement Planning
- College Funding
- Diversification
- Risk Tolerance
- Charitable Giving
- Performance Objectives

Track – Ongoing Collaboration.

We are proactive in our approach and regular contact helps us ensure that your wealth and investment plan reflects changes in your life vision and your evolving priorities. We will follow up with you on an ongoing basis, so that you are up-to-date and informed about changes in the financial world that could affect you, your family, or your future.

Bird Moore Advisory Group
TD Wealth Private Investment Advice
1633 Ellis Street, Suite 410
Kelowna, BC, Canada V1Y 2A8
Toll Free: 1 888 299 2111
birdmoore.ca

Dane L. Bird
Vice President, Investment Advisor,
Certified Retirement Specialist
T 250 717 8110
dane.bird@td.com

Brandon Moore, CFP, FMA, FCSI
Investment Advisor,
Certified Retirement Specialist
T 250 470 3023
brandon.moore@td.com

Bird Moore
Advisory Group