

TD Core Managed Portfolios

Spend your time on what really matters

At TD Waterhouse Private Investment Advice, we're committed to understanding your needs and providing you with exceptional investment solutions through the various stages of your life.

That's why we offer a range of managed investment solutions – including TD Core Managed Portfolios – that put your investments in the hands of experts so you can devote your time to what really matters to you.



Get our trusted team of experts working for you

When you invest through TD Core Managed Portfolios, your Investment Advisor works with our dedicated internal research team. This team of investment experts performs research across a full range of securities then constructs portfolios designed to meet the needs of different investors.

A rigorous investment selection process

Our research team draws on their various backgrounds and areas of expertise, as well as a broad range of resources, to conduct in-depth research and provide ongoing oversight and due diligence to ensure that TD Core Managed Portfolios meet our rigorous criteria.

The research team's investment selection process helps to ensure that only high-quality investments are included in the TD Core Managed Portfolios.

Direct ownership of securities

Directly owning the securities in your TD Core Managed Portfolios provides you with many efficiencies and benefits. These include the flexibility to transfer securities in and out of your portfolio in-kind, the establishment of your own cost base and the opportunity to develop and pursue your own tax planning strategies. In addition, this structure gives us the ability to accommodate any specific security restrictions you might have.

TD Core Managed Portfolios

TD Core Equity Portfolios

There are four TD Core Equity portfolios available. Each holds a diverse selection of 20-35 high-quality securities and is actively managed to provide long-term growth of capital with moderate portfolio turnover:

- Canadian Equity
- U.S. Equity
- North American Equity
- Dividend Equity

TD Core ETF Portfolios

There are six TD Core ETF portfolios available providing an effective solution for the most conservative to the most aggressive investor. Each portfolio contains a selection of 8-11 ETF securities and is actively rebalanced in accordance with the market outlook of the TD Wealth Asset Allocation Committee:

- Conservative Income
- Balanced Income
- Balanced
- Balanced Growth
- Growth
- Aggressive Growth

One management fee covers a range of benefits

Your TD Core Managed Portfolio is held in one or more TD Unified Managed Accounts each delivering an uncompromising combination of benefits - exceptional investment selection and portfolio design flexibility, enhanced levels of control over your investments and comprehensive, consolidated reporting to make monitoring your investments easier than ever – all for one inclusive fee with the simplicity of a single account.

Ask about TD Core Managed Portfolios today.

