

# High Net Worth Planning



**An exclusive service**



# Exceptional services for exceptional circumstances

At TD Waterhouse, we understand that your wealth management needs may become more complex as your wealth increases.

That's why we have developed a comprehensive wealth management planning service that exceeds our standard offering. This exclusive service is available to clients whose needs are more complex or evolving.

You will have access to a team of specialists, including a High Net Worth Planner, who can work in consultation with your tax and legal advisors. The result is a customized approach to wealth management that provides you with personalized options to help you make the right long-term decisions for you and your family.

Discover everything we have to offer and the confidence that comes with a plan that focuses on your peace of mind and financial independence.

## **A team dedicated to you**

We recognize the importance of a personal relationship with someone who knows you best and understands your situation – someone like your TD Waterhouse Investment Advisor or Relationship Manager. As your primary point of contact, they will be working with a team of qualified professionals with varied areas of expertise. This may include legal, accounting, financial and estate planning professionals.



# Preparing for your personal consultation with a High Net Worth Planner

Our team of qualified professionals can help you meet today's opportunities and plan ahead for the services you're likely to need as your circumstances evolve. Here are some of the topics we can discuss to get to know you better.



We look forward to hearing about your financial goals and the opportunity to help you plan for today and the exciting challenges that lie ahead.



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