TD Waterhouse

TD Unified Managed Account

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 and deliver them through the TD Unified Managed Account – making even the most complex investment portfolios easy to understand and monitor – so you can devote your time to what really matters to you.

A more powerful managed account

The TD Unified Managed Account delivers an uncompromising combination of benefits - exceptional product 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.

Product flexibility

The TD Unified Managed Account gives your Investment Advisor the flexibility to leverage the strengths of TD Premier Managed Portfolios, TD Core Managed Portfolios, mutual funds and exchange-traded funds – and combine them into a truly customized investment solution.

Enhanced control

Active portfolio monitoring and our automatic rebalancing service can help ensure that your TD Unified Managed Account is kept in line with your investment objectives even in the most volatile market conditions. Gain peace of mind knowing that your investments are being professionally managed.

TD Unified Managed Account

Comprehensive reporting

You will receive monthly statements, quarterly portfolio reports and year-end reporting for your TD Unified Managed Account as well as for each of the investments held within it - ensuring that you know how you are tracking to your goals.

Investments held in more than one TD Unified Managed Account can be consolidated for portfolio reporting purposes – gaining a top-level view of your overall portfolio without compromising detailed reporting.

Easier administration

Your TD Unified Managed Account can contain multiple investment solutions in a single account, reducing the number of accounts you need to monitor. Fewer accounts mean reduced paperwork and less administration.

One inclusive management fee

The management fee you pay covers the benefits of your TD Unified Managed Account. Management fees paid on a non-registered plan may also qualify as an income tax deduction. Talk to your tax advisor about your specific situation.

A one-on-one relationship with your Investment Advisor

At TD Waterhouse Private Investment Advice, you build a long-term, one-on-one relationship with a dedicated, investment professional. Your Investment Advisor will:

- Take the time to gain an in-depth understanding of your personal situation and financial goals
- Provide custom-tailored investment and wealth management solutions
- Design, recommend and implement a suitable investment strategy based on your unique investment needs
- Offer you ongoing advice and adjust your overall portfolio to account for any changes in your life

Ask about the TD Unified Managed Account today.

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