TD Wealth

Wealth management advice based on you

Your experienced Business Succession Advisor of the Wealth Advisory Services team will work with you and your team of external advisors, including lawyers, accountants and business brokers, to help you maximize your business' value, and create and implement a plan for the smooth transfer of your business down the road.

Jeff Halpern CPA, CA, TEP
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With more than 30 years of financial services, tax, estate and trust experience, Jeff Halpern has been actively focused on providing comprehensive financial and estate planning solutions to his clients.

Jeff has demonstrated a commitment to continuing education and has earned the professional designations Chartered Professional Accountant (CPA) and Chartered Accountant (CA). In addition, Jeff holds the designation Trust & Estate Practitioner (TEP) as a member of the Society of Trust & Estate Practitioners, where he sits on the global professional development committee. He also holds an Honours Bachelor of Business Administration from the Schulich School of Business, where he sits on the Dean's International Advisory Council.

Jeff is an experienced wealth planning professional, and will work with you every step of the way to help you progress towards achieving the goals and dreams you and your family share for your work and business, well-being, lifestyle and legacy.

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