
TD Wealth
"You work hard to earn your wealth. Manage it with someone who has a personal commitment to your needs."
Daniel Correia, CIM®, FCSI®
Investment Advisor, Certified Retirement Specialist
Guild Wealth
Advisory Group
TD

Shared Interest in a Common Goal

When you're busy, you want to have certainty that those managing your wealth are working towards the same goals you are.

We designed our practice to deliver unbiased advice focused on your goals, combined with the vast resources at TD Wealth. We believe that this is the depth of service needed to manage a complex financial situation.

As a result, you receive a highly personalized investment experience, while benefitting from the expertise of specialists like business succession experts and estate planners.

"With the CIM® (Chartered Investment Manager) designation, what you get is more than due diligence; it's a personal commitment to advise clients according to their best interest. All else equal, you'll get the option that will cost you less or earn you more."

Daniel Correia, CIM®, FCSI®
Investment Advisor, Certified Retirement Specialist

"I would gladly recommend Daniel's services to anyone looking for advice. He continuously strives to meet my personal needs, and has implemented effective ways to grow and protect my assets for retirement."

Dr. Danny Enepekides
Chief of Surgical Oncology and Otolaryngology, Sunnybrook Hospital
Client since 2010

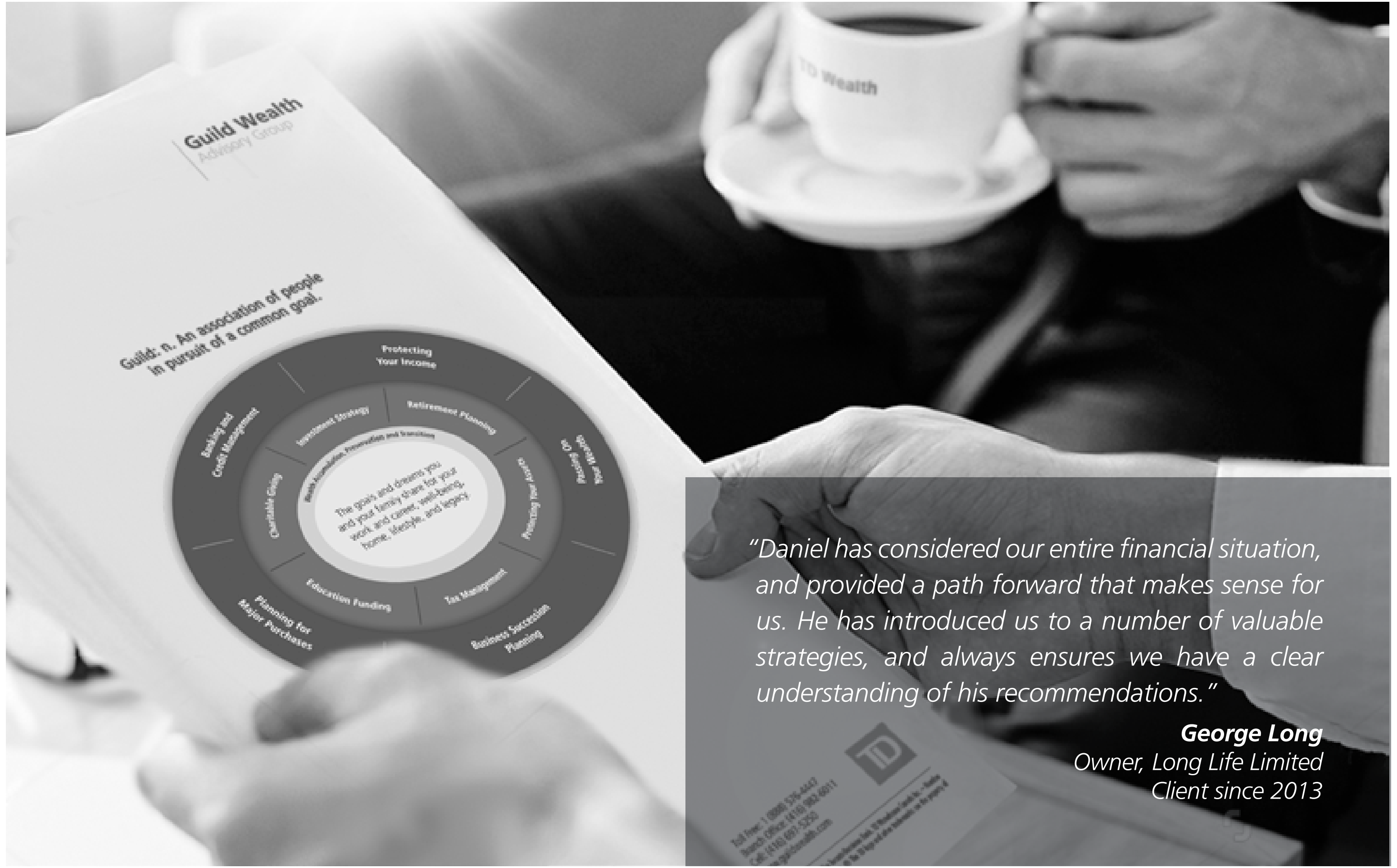
Planning with a Purpose

Your wealth is complex, and it’s essential to have clarity around the steps being taken to meet your goals.

We work to ensure that each of the components of your investment portfolio, your retirement plan and wealth strategies, has a clearly defined purpose with respect to your goals.

We work with you to help:

- Define your asset allocation, risk tolerance and tax-efficient investment strategy
- Determine your optimal retirement date and guide you through the transition
- Plan the succession of your business with support from TD Specialists
- Use personal and business insurance strategies to save tax while managing risk
- Extract capital from your business efficiently
- Create your legacy and preserve family wealth



“Daniel has considered our entire financial situation, and provided a path forward that makes sense for us. He has introduced us to a number of valuable strategies, and always ensures we have a clear understanding of his recommendations.”

George Long
Owner, Long Life Limited
Client since 2013

The Guild Wealth Approach

As your investment advisor, we want you to call us when you are looking to buy a new car, when your son or daughter is getting married, when you have an opportunity to expand your business, or when you're facing any life event. Because we are so tuned in to your current wealth strategies, we can help you make day-to-day decisions that keep you on track to longer-term goals.

STEP 1: **Complete Discovery**
Through discussion and discovery, we understand the type of investor you are, and your various financial goals.

STEP 2: **Diagnostic**
We assess your current situation and provide our initial recommendations.

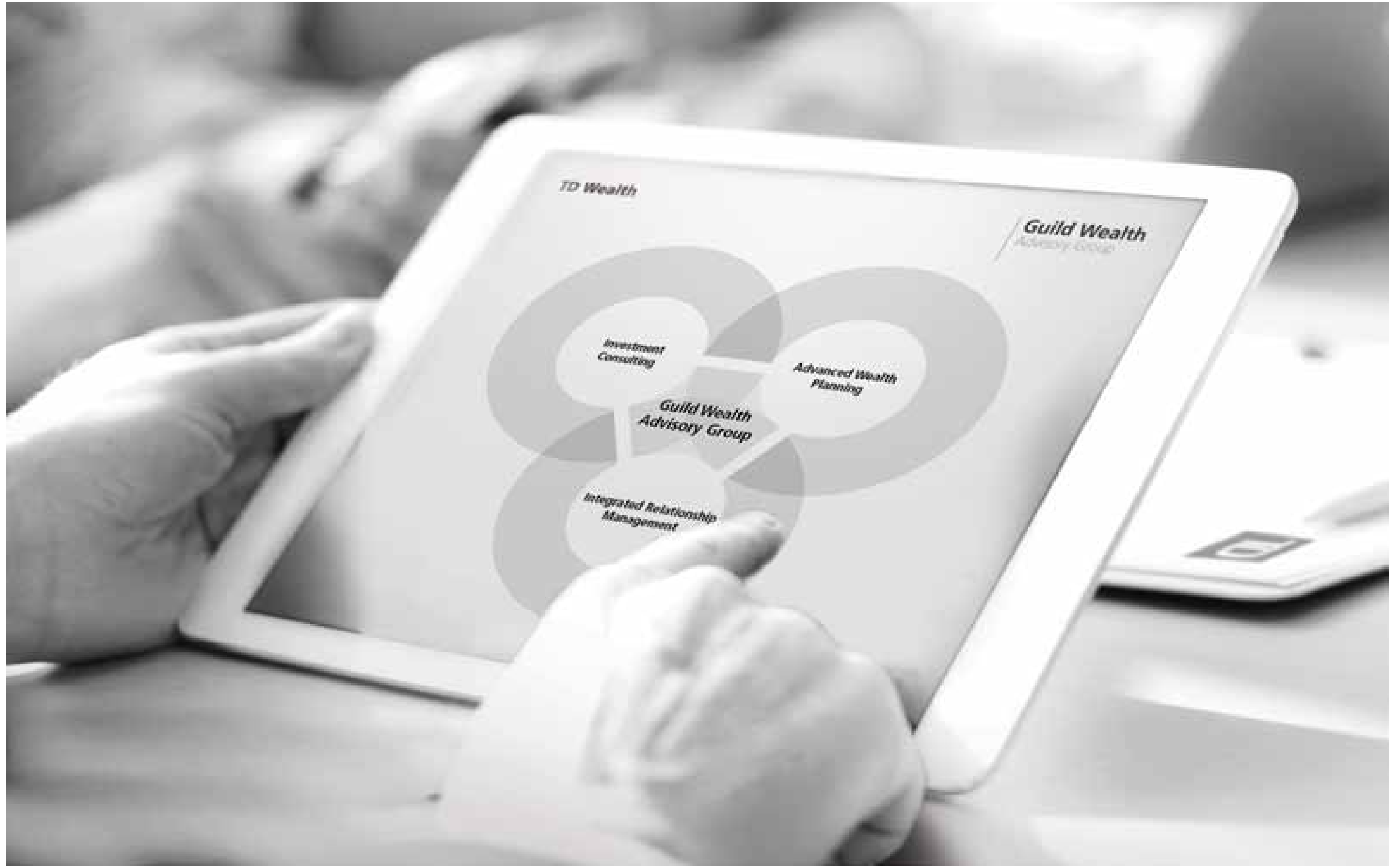
STEP 3: **Investment Plan**
You're presented with an investment plan and Investment Policy Statement, and we walk you through the details.

STEP 4: **Review Progress**
After 45 days, we review your initial investment progress and discuss next steps.

STEP 5: **Wealth Management Plan**
We review your other financial needs, including asset protection, major purchases and education funding.

STEP 6: **Guild Wealth Network**
Through our network of specialists, we implement strategies outlined in your Wealth Management Plan.

STEP 7: **Ongoing Guidance**
We act as a resource, maintaining your portfolio and plan through regular communication.



TD Wealth

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Daniel Correia, CIM®, FCSI®
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guildwealth.com

"Daniel is our 'go-to' for everything remotely financial. He has put order and purpose to our investments, and has helped us stay on track even when our lives change course."

Terrence and Lois Lewis
Retired
Clients since 2010

Guild Wealth
Advisory Group