TD Wealth

Your Wealth Team For Life.

Zoback Holford | Wealth Management Group

TD

Meet our team

Darryl Zoback, B.Econ., CFP®, PFP
Vice President & Investment Advisor

Darryl's approach to an exceptional client experience has always centered around one theme. "Always put clients first, and don't try to be all things to all clients". Not surprisingly then, for over 20 years Darryl has continued to serve his clients utilizing the various tools at his disposal thereby helping to ensure they are on the right path to reach their financial goals.

First and foremost this starts by employing a dedicated support team that strives to provide amazing day-to-day customer service and then engaging TD Specialists such as lawyers, tax accountants, estate practitioners, and financial planners as required to help ensure that our clients wealth needs are met. Darryl is a proud born and raised Calgarian, has two wonderful daughters, his Bachelor's degree in Economics from the University of Calgary, and has both the Certified and Personal Financial Planner designations.

Mike Holford, CFP®, PFP
Vice President & Investment Advisor

Mike has been providing comprehensive wealth management and advice to individuals, small business owners and their families since 1995. Exceptional client service is a fundamental value to Mike and he endeavors to show this every day in his interactions with both long standing clients and newly referred clients alike. Mike's dedication to one-on-one relationships with each client goes beyond a regular 9 to 5 work day and his clients can trust that Mike has their best interests in mind.

Mike is proud to call Calgary home, enjoys spending time with his two grown sons and traveling. Mike holds the Certified Financial Planner and Chartered Investment Manager designations.

Devon Sorge, CPA, CA

Associate Investment Advisor
Financial Planner

Devon holds the Chartered Accountant designation and has a diverse financial background including past positions as a tax specialist, senior accountant, and sales assistant for various firms throughout Calgary. She takes pride in maintaining excellent client relationships through detailed, timely and responsive customer service. Devon obtained her Bachelor of Commerce degree from the University of Alberta and enjoys spending her free time with her family and participating in athletic endeavors here in our city.

Sheumas Macdonald, B.Comm., FMA

Client Service Associate

Sheumas has been with TD Wealth Private Investment Advice since 2008 and has over 10 years of experience in the securities industry. He has a Bachelor of Commerce degree majoring in Finance from Saint Mary's University and has obtained his Financial Management Advisor designation from the Canadian Securities Institute. He recently made the move to Calgary from Halifax and enjoys playing & coaching soccer in his spare time.

Kim Cunningham

Client Service Associate

Kim joined TD Wealth Private Investment Advice in 2003 and has over 28 years of experience in the banking and securities industries. During her career, she has worked in a variety of roles giving her a depth of knowledge and understanding that we believe our clients have come to appreciate. Kim is responsible for client support and administrative duties for the team. Born and raised in Calgary, Kim enjoys spending time with her husband, camping, hiking and running.

Barry Lindemann, B.Comm.

Administrative Associate

Barry's main areas of focus are coordinating our teams marketing and client events, along with being a liaison to our surrounding community and the charities we enjoy supporting. With a Bachelor's degree in Marketing and a background in providing a high level of client service in all his previous positions Barry looks forward to now serving our clients. Born in Calgary, Barry enjoys sports, live music and travelling.

What we offer

We offer tailored investment advice and comprehensive wealth management designed to help simplify and enhance your life. We deliver solutions with global scope and insightful expertise, through a deep personal relationship that enables us to truly understand your needs. Our long-term commitment means that our wealth services can grow and adapt with you, your family and your business, as you move through the many distinct phases of your life.

Who our clients are

Our clients are affluent individuals, families, business owners, corporations and charities with considerable investable assets and wide-ranging, often-complex financial needs. Most are looking for consistent capital preservation and growth, integrated wealth planning, and thoughtful tax strategies to help them protect and grow their wealth in order to achieve their goals.

As someone who doesn't have a lot of experience, time or even knowledge when it comes to investments, it is great to know that I have Darryl and Mike taking care of my future. They have a great trustworthy approach, listen to my needs and questions, and have done an amazing job in helping me reach my investment goals. The whole Zoback | Holford team is great to work with!

– R.J. Carron

Our client-centered service model

We understand that managing considerable wealth can be complicated. Our goal is to simplify things for you by integrating the various aspects of your financial picture into one comprehensive strategy, freeing you to focus on achieving your own personal vision of success. We understand the results you expect and the service you deserve and we work to continually earn your business, through every interaction. Each member of our team shares the same service commitment to making your needs our highest priority, every day.

Understanding you – the key to your tailored wealth plan

We believe that your personal wealth strategy is key to your financial success. However, before we can begin to build your plan, we take the time to develop a deep understanding of you.

Together, we will explore your personal values and beliefs, your financial past and present, including family dynamics and professional interests, and your goals for yourself, your family, and your businesses. Once we've established this complete picture and confirmed it with you, we create your personal wealth plan, which acts as the road map to helping you achieve your goals. Woven throughout your plan are detailed analyses of the tax and insurance considerations of each aspect of your strategy.

As your needs change and evolve over time, so will the services and solutions we offer. Whether you are building your career or business, or shifting into retirement, we believe that our insightful counsel, disciplined planning and effective risk management will help make you more confident in your decisions, and more focused on your future.

A disciplined, balanced approach to your investment portfolio

The cornerstone of every wealth strategy, investment management, is, in our opinion, one of our key strengths. Our investment philosophy is rigorous, disciplined and comprehensive, with a conservative, balanced approach to wealth preservation and growth.

Working for you behind the scenes is a global team of investment professionals and risk management specialists. They provide our team with real-time economic and market research that helps us not only manage your portfolio, but also identify potential opportunities that lie in market shifts.

The Zoback | Holford Wealth Management Team consistently delivers outstanding service. The entire team is available, supportive and helpful. The depth of knowledge and advice that Darryl, Mike and their team offer is significantly contributing and responsible for my overall financial future and success. I am thrilled to have them manage my financial plan and would refer them to all my colleagues and friends.

– Hélène Martin

Helping you achieve your vision of success

Building net worth

We know how important it is to build your wealth so you can enjoy life's priorities and achieve your vision for the future. Working together we can develop innovative strategies to help grow your net worth by identifying which credit strategies and investment solutions match your current lifestyle and needs. Our team of professionals can work with you to develop an effective plan to help you make your vision a reality.

Implementing tax-efficient strategies

You've worked hard to accumulate your wealth and we want to help you to make the most of it. Working closely with you and your tax advisors , we'll create an integrated wealth strategy that will structure your investment portfolio to help reduce tax exposure and keep income available as and when you need it.

Protecting what matters

Life is filled with uncertainty and that's why we're committed to delivering advice and solutions to help protect the things you value at every life stage. Whether through comprehensive risk strategies or connecting you with a specialist in trusts, estates and other risk mitigation products, we've got the expertise to create a comprehensive plan that's right for you.

Leaving a legacy

You are the architect of your legacy and we can help you with the blueprint. We'll collaborate with you to identify your top priorities, from estate planning and trusts to gifting and philanthropy. Our goal? To help you optimize the transfer of your wealth.

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