TD Wealth

Bayswater Group's Investment Approach

Our Investment Approach

Our group takes a disciplined, global approach to investing. We strive to generate consistent returns with less volatility over our clients' investment horizon.

Our starting point is a series of propriety asset allocation models, which we customize for each client. Each portfolio has a combination of global equity, fixed income positions and absolute return strategies. Equities are a concentrated portfolio of industry leaders which have a clear track record of positive performance over a rolling 36-, 48- and 60-month time period and strong history of dividend payments or share repurchases. We rebalance semi-annually and initiate portfolio changes throughout the year, when necessary.

Our investment portfolios are most suitable for accredited investors. We advise individuals and families who meet one of the following criteria:

- Investable assets exceeding $1,000,000;
- Net worth exceeding $5,000,000;
- Personal income exceeding $200,000; or
- Combined income exceeding $300,000.

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Bayswater Group

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