

TD Wealth

Private Wealth Management

Helping you achieve
your vision of success



At TD Wealth Private Wealth Management, we understand that making decisions that will affect your life is a deeply personal experience. We also appreciate the key role that growing and preserving your wealth plays in helping you enjoy the life you want to lead.


That's why we take a unique approach to understanding you, your family and your values. Using behavioural finance and our distinct discovery process, we'll help uncover what matters most to you, so we can build a strategy focused on helping you achieve your vision of success.

Depending on your needs, your TD advisor can connect you with a dedicated team of private wealth management specialists, who will work collaboratively to develop your personal wealth strategy. Whether you're just building your career or shifting into retirement, looking for help in transferring your wealth or transitioning your business, we have the breadth of expertise to design a plan that will help make you more confident in your decisions, and more focused on your future.

We look forward to working alongside you and your family to help you achieve your goals.

A handwritten signature in dark blue ink, appearing to read 'Dave Kelly', with a stylized flourish at the end.

Dave Kelly
Senior Vice President
TD Wealth Private Wealth Management



TD Wealth

Private Wealth Management

You and your needs





You and
your needs

At TD Wealth, we believe in building long-lasting relationships that evolve as your needs change over time.

Whether your needs are straightforward or complex, we're dedicated to delivering tailored, comprehensive, wealth management strategies, all with our personalized, client-focused service.



TD Wealth

Private Wealth Management

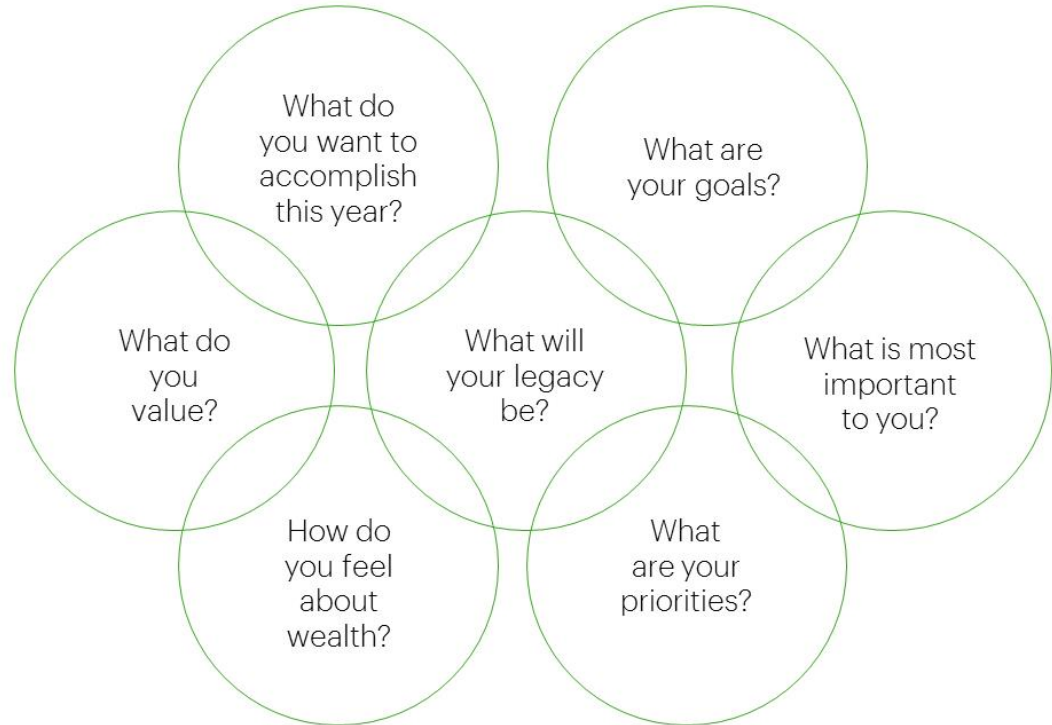
Our discovery process

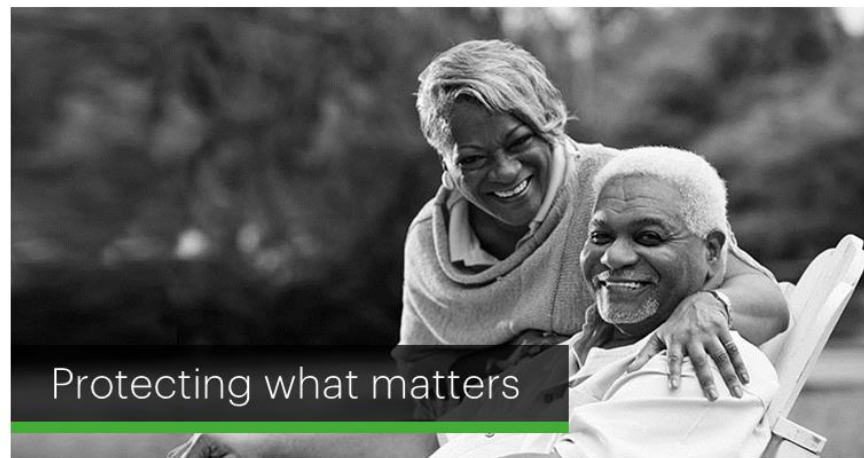




Our discovery process

Your TD advisor will take you through a unique discovery process that uses behavioural finance theory to uncover the values behind your personal vision of success and help determine what truly matters to you.





A black and white photograph of a man with glasses and a dark sweater over a checkered shirt, sitting at a desk and looking down at a smartphone. A semi-transparent dark grey rectangle is overlaid on the left side of the image, containing white text and a green TD logo. A solid green horizontal bar is at the bottom of the grey rectangle.

TD Wealth

Private Wealth Management

Our people: Your team





Our people:
Your team

Through our discovery process we'll connect you to the right relationship manager, who based on your specific needs, will build a team of specialists around you to help achieve your vision of success.





Our people:
Your team

Your relationship manager will stay in tune with your needs and help ensure you're on track to achieve the future you envision for yourself.

As your needs and priorities evolve, your wealth strategy will evolve with you. Through regular contact, your relationship manager will routinely assess your investment portfolio and goals, ensuring you are introduced to the right specialists at the right time and that your investment portfolio is aligned to your vision of success.



TD Wealth

Private Wealth Management

Our investment philosophy





Our investment philosophy

Our mandate is to help you preserve and grow your wealth through our tailored investment solutions.

Our portfolios are guided by an investment philosophy based on understanding your goals, disciplined planning, insightful advice and effective risk management. This philosophy helps us ensure strong and stable growth of your assets in a wide range of market conditions.



TD Wealth

Private Wealth Management

Our services



A black and white photograph of three men in suits standing in a modern office environment. They are looking at a tablet together. The office has large windows, industrial-style lighting, and a tufted sofa.

Our Services

Investment Management

Our investment management services are tailored to your specific needs.

TD Wealth Private Investment Counsel is an investment offering for affluent clients that leverages the high calibre investment capabilities and rigour that TD Asset Management uses with its institutional clients, such as pension funds and foundations.

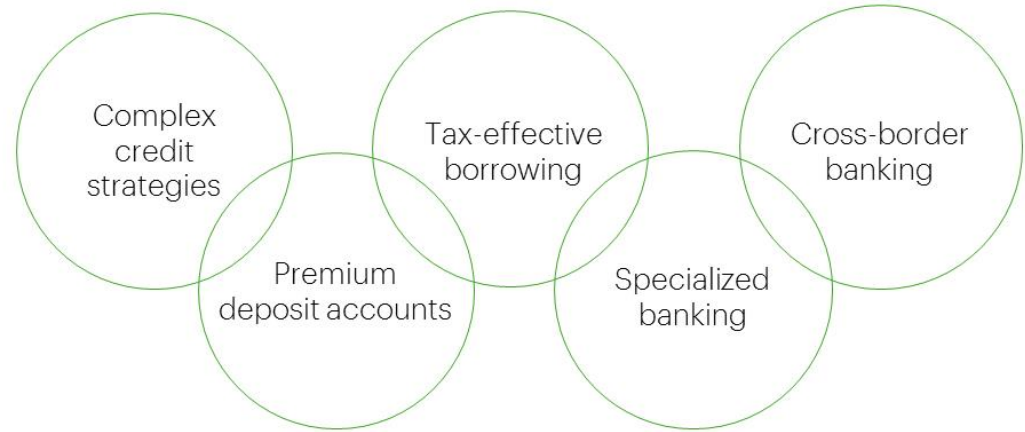
TD Wealth Private Investment Advice combines the firm's best thinking with access to a broad set of investment solutions. Your advisor will deliver proactive and personal advice, working closely with you to make key decisions about your portfolio in line with your goals.



Our Services

Private Banking

Your Private Banker understands the often-complex needs that go hand-in-hand with busy lifestyles and growing wealth. We offer personalized service, proactive advice and a range of services, including:





Our Services

Private Trust

Our Estate and Trust Services team will help you take steps today to preserve and transfer your wealth for future generations.

We can:

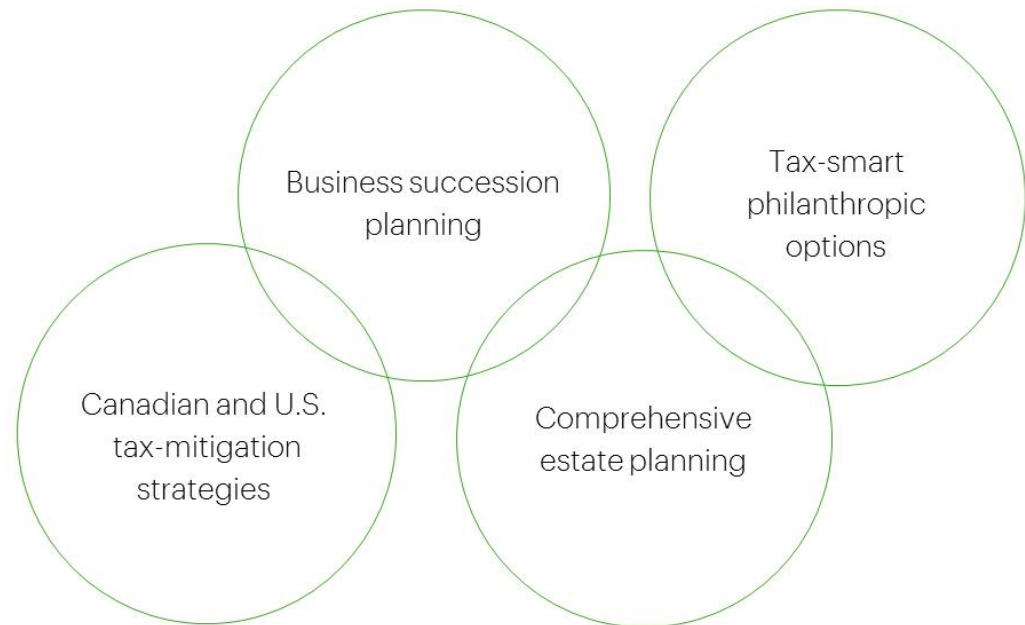
- Assist you and your family in preparing for the later stages in life through our will planning service
- Act as power of attorney, provide executor services to settle an estate or serve as trustee for the protection, management and distribution of trust assets
- Support trustees and executors in carrying out their duties as cost-effectively and efficiently as possible



Our Services

Wealth Advisory Services

Our Wealth Advisory Services team of specialists delivers a broad range of services for you and your family, including:





Our Services

Direct Investing

TD Direct Investing offers a wide range of tools, easy-to-use resources, market research and 24/7 access to licensed investment representatives. With TD Direct Investing, you can:

- Invest via our WebBroker platform or on-the-go through our TD app
- Trade a diverse set of securities, including equities, bonds and fixed income, mutual funds, exchange-traded funds, and precious metals and options
- Execute your plan through RSPs, TFSAs, RIFs, RESPs and RDSPs, as well as cash and margin accounts

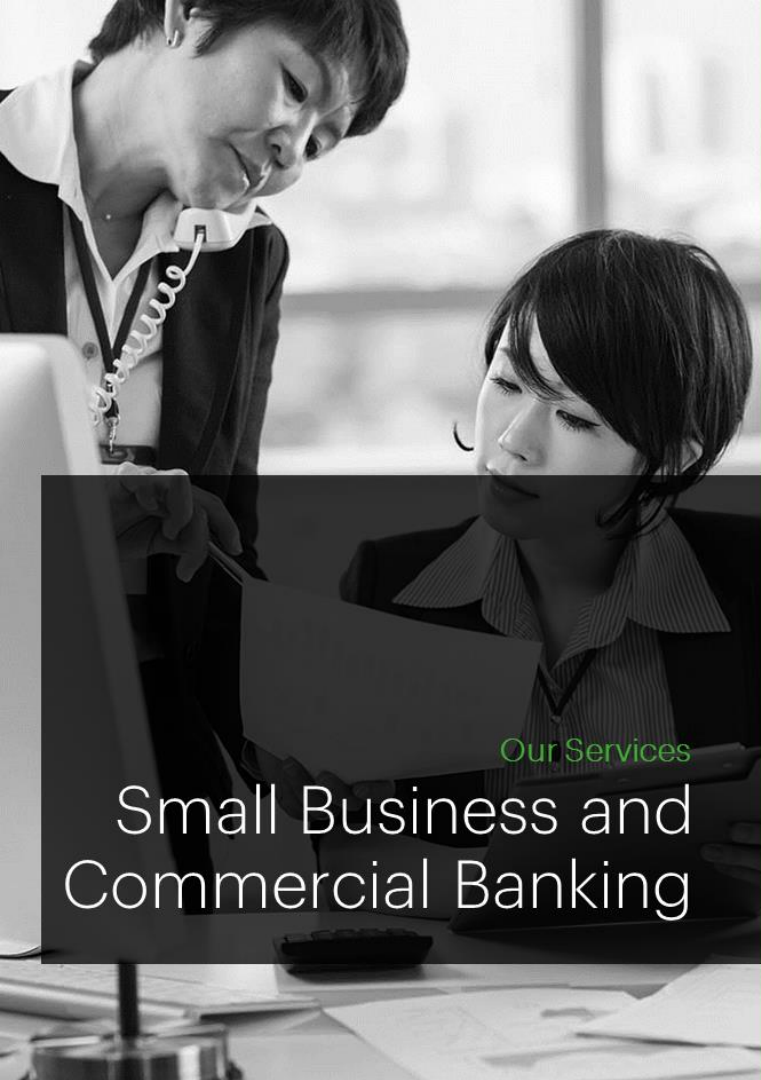


Our Services

TD Securities

TD Securities is one of Canada's leading providers of capital market products and services. We deliver advice and execution to investment advisors managing high-net-worth portfolios, as well as to governments, corporations and institutions.

- Your investment advisor has direct access to our sales and trading teams, along with country, industry and company-specific research to help you navigate market volatility
- We equip your investment advisor with industry-leading information and guidance to develop risk management strategies and customized integrated financial solutions for your portfolio



Our Services

Small Business and Commercial Banking

At TD, we know that your business is our business. We take the time to understand your needs and provide banking solutions that can help you achieve your goals.

We offer:

- Chequing and savings accounts (\$CDN/\$US)
- Custom credit solutions
- Merchant services
- Cash management solutions
- Tax payment and filing
- Investment solutions and group RSPs
- Foreign currency solutions



TD Wealth

Welcome to
TD Wealth

Our commitment to you





Our commitment

We're committed to fully understanding your vision and values, and providing what you need to help you feel confident and in control when it comes to your complete wealth picture. When you work with us, you'll receive:

- The opportunity to participate in a proprietary online and in-person Discovery process that will help us understand what truly matters to you
- Exceptional services delivered by a dedicated relationship manager who can connect you to specialists with the expertise to help custom design your wealth plan
- Goals-based planning that ensures your wealth plan reflects your individual vision of success – and changes as you do
- Competitive fees and easy-to-understand information about our fee structure

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