Jamie Luong

Senior Private Banker

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I am an experienced banker with over 15 years of client-facing experience in the financial services industry. During my tenure I have worked in various positions in retail banking at TD. Most recently, I worked as a Manager of Financial Services in the Willowdale neighborhood of Toronto, and was recognized as one of TD Canada Trust's top Financial Advisors in 2016, while servicing High Net-Worth clients in the affluent Forest Hill North area of Toronto. Through my time at TD, I have developed the skills necessary to understand the unique needs of our high net worth clients and the ability to create tailored solutions to help them achieve their goals.

I am a Private Banker that values the long lasting relationships I build with my clients and their families. My goal is to simplify wealth management for my clients, and I do this by providing comprehensive services and solutions to high net worth individuals and their families. I regularly work with TD specialists in the areas of investment management and investment strategy, estate planning, trust, business banking, philanthropy and tax mitigation strategies to help meet the unique needs of clients. In addition I help to coordinate with TD's business banking specialists and TD's philanthropic giving foundation.

I completed my studies at York University and earned a Bachelor of Arts degree specializing in economics and psychology. I have completed a number of accreditations specific to Wealth management, including Canadian Securities Course (CSC), Personal Financial Services Advice (PFSA), Branch Compliance Officer's Course (BCO) and I am currently working on completing my Personal Financial Planner designation (PFP).