

# Testimonials from our clients



Charles is a forward-thinking advisor with a strong set of values. I know that he has invested his own money as he invests my retirement savings, and that matters to me.

Charles works with a kind, reliable, very dedicated team that always provides great service. I also like the interface of TD's client website, and appreciate having the option of checking in on my investments online as well."

**Michel A. Brunet, Senior Counsel, Dentons**

"I am retired for a number of years now. I have always been interested in the stock market and careful with my money. Charles is an analyst by nature, and a true gentleman. He is very professional, and I always feel he is being honest and open with me. I have trusted him with some of my savings and he has been successful with it.

Charles also has a great team working with him. I know that if I have questions I have an open line to them, and I am very happy with their service. I would certainly recommend them to my friends."

**George Reinitz, Founder, Jaymar**

"I felt Charles was the right guy when I met him, and he hasn't proven me wrong. Over more than a decade together he has helped me work out a plan to shift from owning my dental practice into enjoying an active retirement with my wife. He has achieved good returns for us through all kinds of markets, has shifted our portfolio as our lives have changed, and has created income projections to carry us through our next chapter. He's there for every stage. Charles has also become more than an advisor to us over the years – he is someone I consider a friend.

**Barry Cogan, Retired Dentist**





Charles has a consistent record in stock-picking that generates steady returns. He is a thoughtful, careful and dedicated investment advisor. And Isabelle and Marc provide consistently great service – they are thorough, helpful, and accurate in everything they do for me.”

**Kenneth Stodola, Retired Entrepreneur**

“After a negative experience with a less-than-transparent advisor, in addition to spreading some of our money across three investment advisors as a means of assessing their performance, we analyzed investment strategy/wealth management proposals from four different firms. Charles emerged as the clear choice for us.

Charles and his team make us feel as though we are their number one client. As for performance, he has exceeded our expectations many times over. He doesn't speculate and we no longer worry about daily changes in the market because we trust Charles and his approach.

Through Charles, my husband and I have also been able to access other TD services, including private banking and establishing a private foundation as part of our estate plan. The team even helped us write a mission for our foundation, which is allowing us to give back to the community that has given us so much.

My only regret is that I didn't choose Charles earlier.”

**Dr. Gaétan Filion, M.D. , F.R.C.P. ( c ), M.Sc. , EMBA,**

“When I sold my family-owned business in 2010, I needed to invest the proceeds of the sale. I split the funds between two advisors initially, and then a year ago I transferred everything to Charles' management. He has deep theoretical knowledge, he treats my money like it is his own, he gets sound results, but most of all he has a plan. He knows what he wants to achieve and how.

But that isn't the best thing about Charles. His best quality, in my opinion, is his integrity and his most powerful asset is his team. Isabelle, Marc, James and Emilie set the bar very high when it comes to client service. They go above and beyond the scope of administrative tasks to make our life easier, and they do it with a smile. They always make us feel valued.

**Michel Langlois, Retired Entrepreneur**





I met Charles during a very vulnerable period in my life. I was in the process of settling a divorce and 'starting from scratch' in many respects – and I needed help! Charles was understanding, discreet, friendly, and went the extra mile for me by taking care of a delicate, yet critical, aspect of my life so that I could focus on myself and my children. He's a highly intelligent, straight shooter.

Charles and his team understand my life plans and they have been there to support me in every way possible, in addition to collaborating with other professionals in my support network. I also like the expertise and oversight that come with Charles' team being part of TD – for me, that's been important in terms of the reputation and convenience of a one-stop shop."

**Maggy Z.**

"Charles has been looking out for me and my family for 20 years now. My wife liked his approach so we decided to give him a try.

I feel that his best quality is that he's very disciplined. I've never lost any sleep during the tough markets over the past two decades because Charles has always had a balanced approach and portfolio and it's done well. I have also always liked that he was backed by a professional institution like TD – I don't want to deal with a one-man shop."

**Claude Arcand, Retired Entrepreneur**

"Back in 2007, it was brought to our attention how much we were paying in commissions for our mutual funds investments. It was time to change. Four friends recommended four different financial advisors and we interviewed each one.

Charles was an easy choice for us to make. We liked his approach, his sincerity, his openness, his frankness, his understanding of finance. The fact that he and his team provide service in both English and French was also important to us.

We deal with Isabelle and Emilie on a regular basis and Marc occasionally. All questions and financial business at hand are dealt with expediently, and expertly. Our accountant has met with Charles and he has reassured us that we are in good hands.

Our investment has grown nicely over the past decade thanks to Charles Martin and his team. We are confident it will continue to grow significantly as we head towards our retirement.

**Dr. Barry Fine, Medical Doctor**



**The Martin  
Advisory Group**

**The Martin Advisory Group**

TD Wealth Private Investment Advice  
1350 Rene-Levesque West, 9th Floor, Montreal, Quebec H3G 1T4  
T: 514 289 7506 | T: 1 877 669 8400 | F: 514 289 0032

