

TD Wealth

Organization: Eric brings structure and order to the financial aspects of your life by directing you through the complexities of investment and tax management, and estate planning strategies.

Accountability: Eric will follow through on the commitment to implement and monitor strategies by working with you to strategically prioritize and review your goals.

Objectivity: Your investments will be managed rationally by removing the emotionally driven decisions that could offset our plan.

Proactivity: The services provided transition as you progress through different stages of life. By assessing your current life stage, you will be introduced to the appropriate TD specialists.

Education: Eric will simplify the planning process and make sure that you fully understand the selected practices and solutions.

Collaboration: Not only will Eric work in collaboration with your personal professionals such as accountants and lawyers, he will work directly with you by taking the time to fully understand your values and needs.

