TD Wealth

TD Wealth Private Investment Advice
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Wealth management advice based on your unique goals

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My career in the investment industry began in 1994 and for the last 18 years, I have been providing investment advice to individual clients and their families. I joined TD Wealth in March of 2009. The "holistic" approach and attention to personalized client service that TD Wealth Private Investment Advice delivers is very much aligned with my approach to the Investment and wealth management process credentials.

I graduated from the Bachelor of Commerce program at the University of Alberta (1990) and completed my Canadian Securities Course (CSC) and Personal Financial Planner (PFP) designation from the Canadian Securities Institute. I am a Life Insurance Advisor with TD Wealth Insurance Services and have also obtained my Options license. In September 2000, I was awarded the Chartered Financial Analyst (CFA) designation, which is recognized throughout the world. I was born and raised in Edmonton and have three lovely children, Athena, Aidan and Amalia.

Roberto Gomez
Client Service Associate
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Roberto moved to Canada in 2013 from Colombia. He studied Business Administration and shortly after his graduation, he proceeded to work in the financial services industry in a Financial Advisor role with TD Canada Trust, engaging his customers in conversations to understand and help meet their current and future financial needs.

Passionate about long term savings and investing, the move to TD Wealth Private Investment Advice was a natural fit. Excited about this change in his career, Roberto looks forward to delivering superior client service and many more challenges ahead. In his free time, Roberto loves to go camping, hiking and outdoor activities in general. He also rescued a mutt and is not difficult to see him walking his dog in downtown even during cold winter days. Roberto will help provide support in administrative aspects and brings a tremendous amount of enthusiasm and energy to the team.