Discipline that delivers

Helping you achieve your goals and build wealth

Did you know?

- Advised clients have three times the net worth of non-advised investors[1]
- Professional advice helps investors adhere to their Financial Goals[1]
- Advised investors often have higher savings rates[1]

Integrated solutions

- Estate Planning Strategies
- Tax-Efficient Strategies
- Wealth Protection Strategies
- Trust Structures
- Education Funding
- Business Succession planning strategies

Disciplined investment approach

- Helps to remove emotion from investing
- Firmly established processes and procedures
- Ongoing monitoring, reviewing and reporting

Clearly defined asset allocation models

- We determine an appropriate asset allocation for you and your family
- Changes related to asset allocation are based on your risk profile and a long-term view of macroeconomics
- Research shows that asset allocation accounts for over 90% of investment returns[2]

Professional portfolio management

- We put you and your family's interests first
- We believe that a Portfolio Manager's methodology is more important than past performance
- We manage assets for future performance and tax-advantaged total return

Forward-looking investment strategies

- We use progressive portfolio management tools such as those employed by Pension Plans, Foundations and Endowment Funds
- We employ currency neutral and hedging strategies, options and exchange traded funds
- Strategies are designed to help provide increased safety, enhanced income and reduced volatility

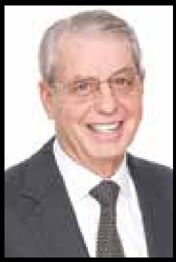
Transparent, fee-based solutions

- We pride ourselves on providing truly independent advice
- Fee-based solutions align our interests with yours
- Potential tax deductions for non-registered accounts

Backed by a globally recognized firm

- Founded in 1855, TD has approximately 22 million customers around the globe
- TD Bank Group has longstanding history as a solid financial entity
- TD was ranked #7 as the World's Safest Commercial Bank in 2017[3]

1. Based on "Value of Financial Advice", Investment Funds Institute of Canada, 2012;
2. https://www.cfapubs.org/doi/pdf/10.2469/faj.v66.n2.4;
3. Based on the Global Finance Magazine Survey, 2017.



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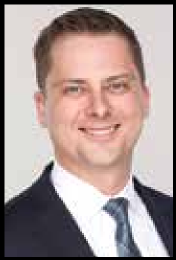

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Commissions, management fees and expenses all may be associated with investments in exchange-traded funds (ETFs). Please read the prospectus and summary document(s) before investing. ETFs are not guaranteed, their values change frequently and past performance may not be repeated. ETF units are bought and sold at market price on a stock exchange and brokerage commissions will reduce returns.

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