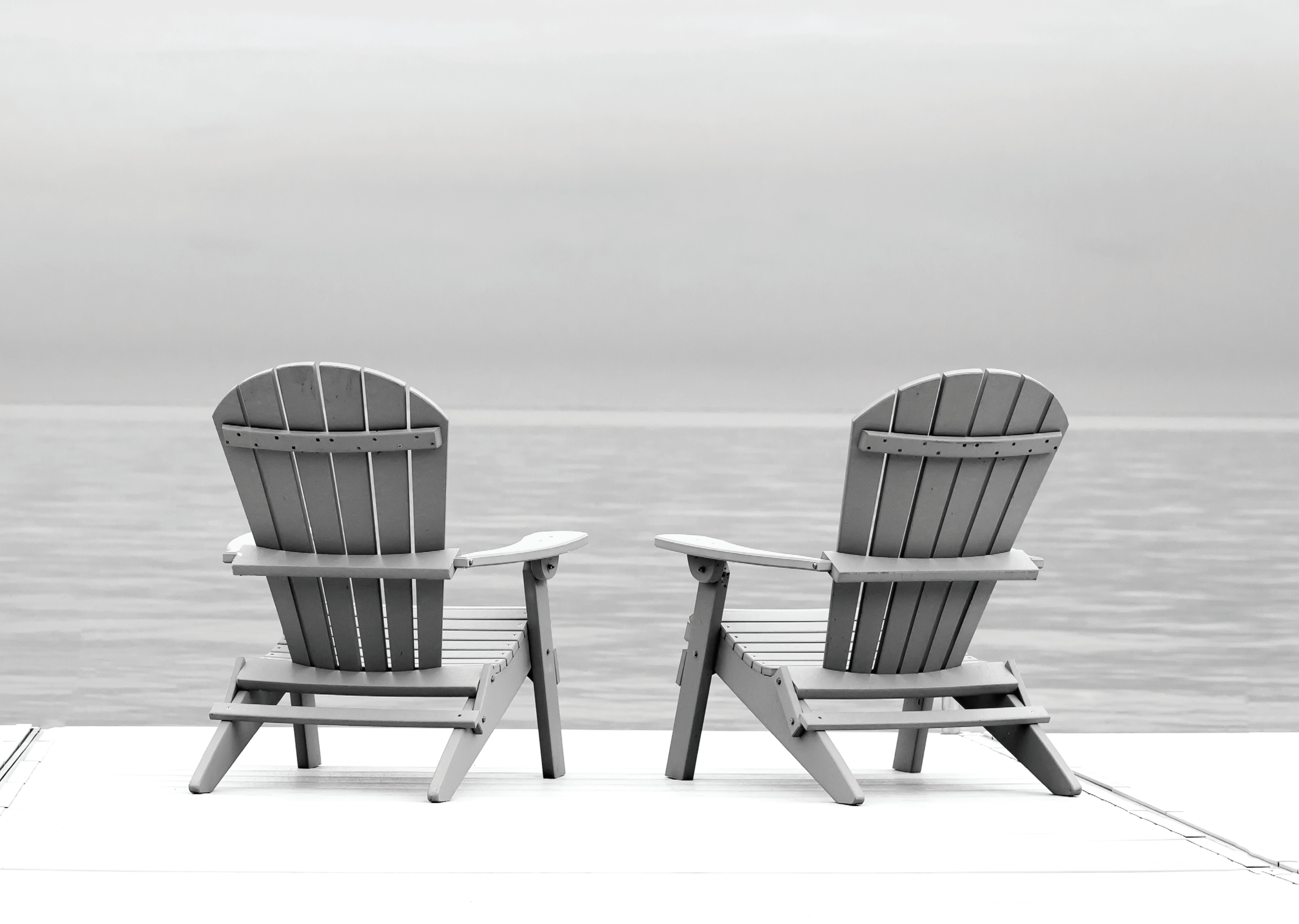
TD Wealth



TD Wealth Private Investment Advice

You decide where you want your wealth to take you. We design a path to help get you there.

Green Point

Private Client Group

What we offer

Managing your portfolio effectively can play a key role in helping you achieve important investment milestones, but it's just one aspect of an integrated wealth strategy that encompasses many aspects of your life now and your aspirations for the future.

Working together, we can create a step-by-step plan that can help you reach your long-term financial and evolving lifestyle goals.

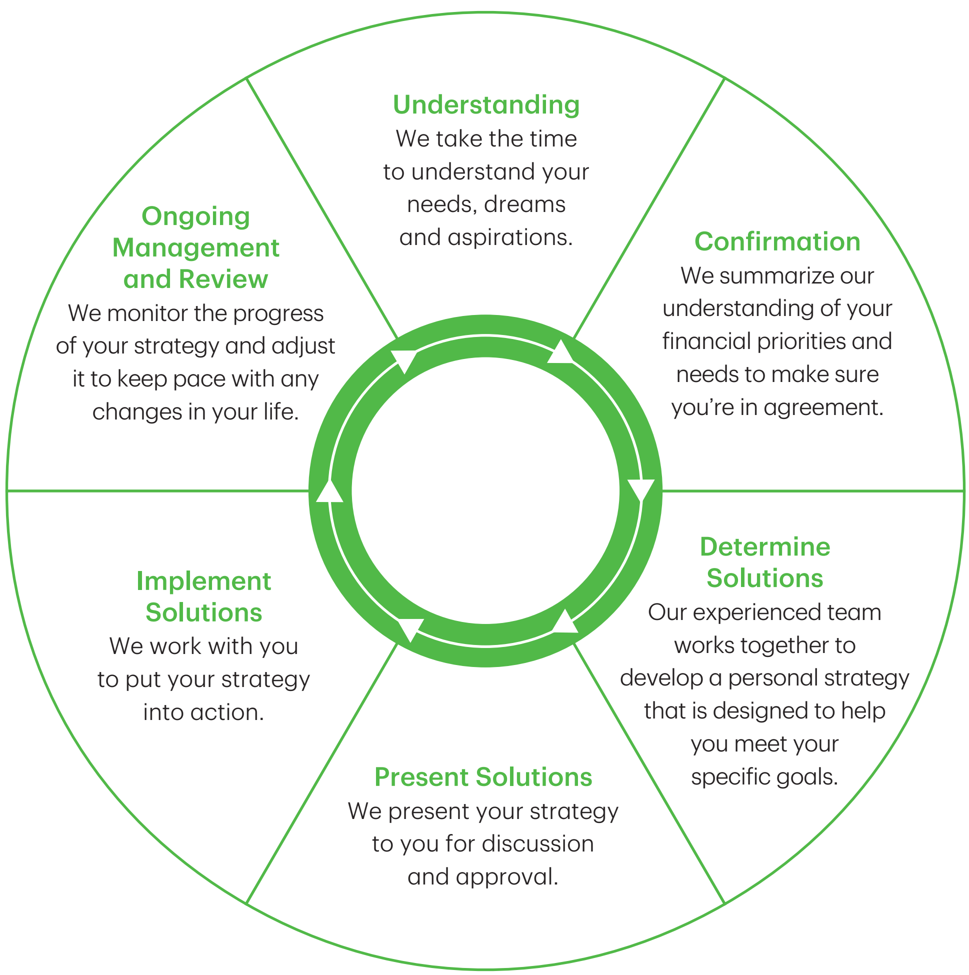
Our client-centred approach

Our relationship with you is the key to offering you tailored wealth strategies. The insight we gain from working with you is the basis on which we design your unique strategy that fits your goals. We understand what makes your situation different. We actively listen and gather in-depth information to establish a clear understanding of your goals.

We believe that your personal wealth strategy is key to your financial success. However, before we can begin to build your plan, we take the time to develop a deep understanding of you.

Understanding you

We start with a deep understanding of who you are, your values and your vision of success. This means reviewing the financial decisions you've made over the years, the goals you've set for yourself in the years to come, and the ways in which these reflect what is important in your life. To create your personal investment and wealth plan, we leverage our broad expertise to fit your unique needs.



A disciplined approach to investment management

Investment management is one of our key strengths and the cornerstone of every wealth strategy. Our investment philosophy is rigorous, disciplined and comprehensive, with a balanced approach to wealth preservation and growth.

We also draw on the expertise of a variety of TD investment professionals and risk management specialists. They provide our team with economic and market research that helps us not only manage your portfolio, but also identify the opportunities that lie in market shifts.

Getting the appropriate investment advice is a key part of managing wealth. But it's just one part of a bigger picture. You may also need to manage ongoing finances, minimize taxes or structure your estate in a tax-efficient manner.

Integrated wealth services

We take an integrated approach, bringing in other TD specialists as required to develop a custom wealth strategy. We assemble as a team in developing the solutions you require, such as:

- A retirement plan
- Tax mitigation strategies
- Business succession advice
- Private banking solutions
- Estate and trust services
- Customized credit
- Asset protection strategies
- Philanthropic planning

Helping you achieve your vision of success

Building net worth

We know how important it is to build your wealth so you can enjoy life's priorities and achieve your vision for the future. Working together we can develop innovative strategies to help grow your net worth by identifying which credit strategies and investment solutions match your current lifestyle and needs. Our team of professionals can work with you to develop an effective plan to help you make your vision a reality.

Implementing tax-efficient strategies

You've worked hard to accumulate your wealth and we want to help you to make the most of it. Working closely with you and your tax advisors, we'll create an integrated wealth strategy that will structure your investment portfolio to help reduce tax exposure and keep income available as and when you need it.

Protecting what matters

Life is filled with uncertainty and that's why we're committed to delivering advice and solutions to help protect the things you value at every life stage. Whether through comprehensive risk strategies or connecting you with a specialist in trusts, estates and other risk mitigation products, we've got the expertise to create a comprehensive plan that's right for you.

Leaving a legacy

You are the architect of your legacy and we can help you with the blueprint. We'll collaborate with you to identify your top priorities, from estate planning and trusts to gifting and philanthropy. Our goal? To help you optimize the transfer of your wealth.

Meet our team

Our team has been working with affluent clients and their families for many years. Complementing that wisdom is our commitment to ongoing industry training, with many of our team members having achieved multiple industry certifications.

Green Point Private Client Group
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Rodney Beveridge, CIM®, B.Comm (Hons), B.Sc, – Portfolio Manager, Investment Advisor

A Queen's University double major with honours, Rodney is an information sponge in the world of finance.

Rodney joined the investment industry in 2004. He went on to enjoy tremendous success as an Investment Advisor before joining TD Wealth Private Investment Advice in 2014.

Spending much of his spare time reading about markets and academic theory, Rodney is a strong ally to have at his client's side. Striving to be up-to-date on the latest corporate developments, clients can be certain that Rodney tries to ensure that they are receiving the pertinent information that may impact their finances.

Rodney along with his family enjoy a very active lifestyle. When not participating in fitness competitions, he enjoys snowboarding in winter and surfing in summer. On weekends you can often find him in his home garage restoring classic cars or at Circuit Mont-Tremblant putting them to use.

Nader Nasr, BEng, CFP®, CIM® – Investment Advisor

Bringing engineering insight and problem solving to the world of wealth planning.

A computer engineering graduate, Nader found his passion in the field of financial services and advising clients on how to navigate difficult financial decisions. He began his career in the industry in 2004 and became an Investment Advisor in 2005. He joined TD Wealth Private Investment Advice in 2014.

Detail oriented and results focused, Nader owes his success to the depth of his knowledge, his incredible dedication to his craft, his clients, and his team. He brings his unique analytical skill set to every client meeting to help pinpoint problems and identify solutions. He holds Chartered Investment Management and Certified Financial Planning designations and is a Life Insurance Advisor with TD Wealth Insurance Services. In his free time Nader likes to spend quality time with his two daughters Alina and Alexa. A West Island resident since 1995, he enjoys spending time with, and giving back to, his community including coaching with the Lakeshore soccer association. He also enjoys music, travel, cooking, snowboarding, woodworking and renovations, motorcycle touring, all things technology related, staying fit and living an active lifestyle.

We're ready to begin the journey of helping you manage, preserve and transition your wealth. Shall we begin? Please contact us for more information or to arrange a complimentary consultation.

We look forward to learning more about what matters most to you.

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