



TD Wealth

Wealth Advisory Services



Access to knowledgeable planning specialists who can help you with strategies to grow and transition your wealth.



Wealth Planning Services:

A comprehensive wealth plan to help you achieve your financial goals.

Tax Mitigation Strategies:

Practical solutions to help you make the most of your wealth.

Estate Planning:

Solutions seeking to enhance your legacy.

Business Succession Planning:

Strategies to help maximize the value of your business and transition it to new ownership and/or management.



Wealth Planning

We work with you to develop comprehensive wealth strategies based on your unique circumstances that evolve as you do.

Think of your tailored wealth plan as your roadmap to achieving what matters most to you.



Tax Mitigation Strategies

Tax mitigation strategies are an integral part of a complete wealth plan. A well-considered wealth plan highlights tax considerations and opportunities, such as:

Preserving
wealth over
the long term

Maximizing
retirement
income

Transitioning
assets
to family
members

Achieving
philanthropic
goals



Estate Planning

You are the architect of your legacy and we want to help you with the blueprint.

Our professionals apply their expertise in estate and trust planning to assist with developing solutions that reflect your personal choices for the future, and the legacy you will leave behind.



Business Succession Planning

We can work with you and your team of external professionals, including lawyers, accountants and business brokers, to help maximize your business's value.

We can also help you create a plan for the transition of your business when the time comes.

The information contained herein has been provided by TD Wealth and is for information purposes only. The information has been drawn from sources believed to be reliable. The information does not provide financial, legal, tax or investment advice. Particular investment, tax, or trading strategies should be evaluated relative to each individual's objectives and risk tolerance.

TD Wealth represents the products and services offered by TD Waterhouse Canada Inc., TD Waterhouse Private Investment Counsel Inc., TD Wealth Private Banking (offered by The Toronto-Dominion Bank) and TD Wealth Private Trust (offered by The Canada Trust Company).

®The TD logo and the other trade-marks are the property of The Toronto-Dominion Bank.