



# Josh Campbell

## Private Banker

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I am a Private Banker with 5 years of wealth management and financial services experience. I work with my clients to discover their financial goals and objectives to truly understand what is important to them. I understand the often complex needs that go hand-in-hand with busy lifestyles and growing wealth. I offer personalized service, proactive advice and a range of services including premium deposit accounts, tax-effective borrowing, specialized banking and cross border banking. My TD career started in 2015 at TD Canada Trust. I have transitioned through the roles of Financial Services Representative, Financial Advisor, Financial Planner and most recently, Private Banker. In each of my roles, I have worked directly with many TD specialists to identify areas where we can add value to our client's unique financial situations. During my time in my previous roles I have gained extensive knowledge in the following areas: estate and retirement planning, tax minimization, and small business banking strategies..

In my previous role of Financial Planner, I was nominated by my peers and subsequently was selected as a winner by management for the 2018 Q1 Star Award (1). As a Financial Advisor I was nominated for the Top Advisor award for three consecutive quarters, where again, I was able to stand out amongst the district for my accomplishments. These roles combined have exposed me to a variety of different products and services within TD Canada Trust and TD Wealth, and have allowed me to form the proper connections to service my clients.

I attended Humber College Institute of Technology and studied Business Management with a focus on Economics and Finance. Since graduation I have continued my education with many accreditations specific to wealth management. These courses include Investment Funds in Canada, Canadian Securities Course, Branch Compliance Officer, Conduct and Practices Handbook, Wealth Management Essentials and Financial Planning I and II. I am currently in the process of completing my Personal Financial Planner (PFP®) and Chartered Investment Manager (CIM®) designations.



(1) Star Award is given by TD for Wealth employees who maintain a high level of professional business conduct and integrity throughout the year as well as demonstrate excellence in their field

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