



## Steven Kelly

### Senior Private Banker

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As a Senior Private Banker, I have over 14 years of banking experience with TD which includes Branch Manager, Manager Workforce Effectiveness BC and Business Advisor. I strive to deliver exceptional client care while recommending personalized credit and banking solutions with great accuracy, speed and professionalism.

To ensure we provide personalized service and attention to detail, we work with a limited number of health care professionals. This focused approach allows our team to spend more time helping to simplify our clients' lives. When appropriate, we can engage TD specialists who can help us to provide insightful counsel, disciplined planning and effective risk management for various stages in the life cycles of health care professionals.

We work closely with TD specialists to strive to deliver strong results to health care professional clients. They can help us to assemble a comprehensive plan, which covers the complexities of tax planning, cash management, long-term investing, estate and will planning and trust services. I act as the main point of contact for my clients and guide them through each stage of their lives with the utmost care and professional advice, while ensuring that they are provided with a customized wealth plan to help them meet their unique financial needs.

In my personal time you will find me with my wife Kayla and our dog Finley walking around Victoria. I also enjoy playing golf and hockey as well as enjoy trying new restaurants in Victoria or while traveling.

