TD Wealth

Northlake Wealth Management

You've built your wealth.

It's our job to help you grow and protect it for the years ahead.

At Northlake Wealth Management, we manage your wealth as if it were our own. Our personal wealth is invested side-by-side with yours. Our definition of success is measured by you achieving your goals.

For more than a decade, we've handled the complex needs of high-net-worth clients around the world. Working with us, you can expect an experienced team of professionals tailoring a proven strategy around your evolving needs.

We are passionate, disciplined and focused on helping you optimize the details of your wealth plan at every stage.

It's about your life, not only your money.

Supporting you through life's stages

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.

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 trusted accountant, we'll help reduce your 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.

Leaving a legacy

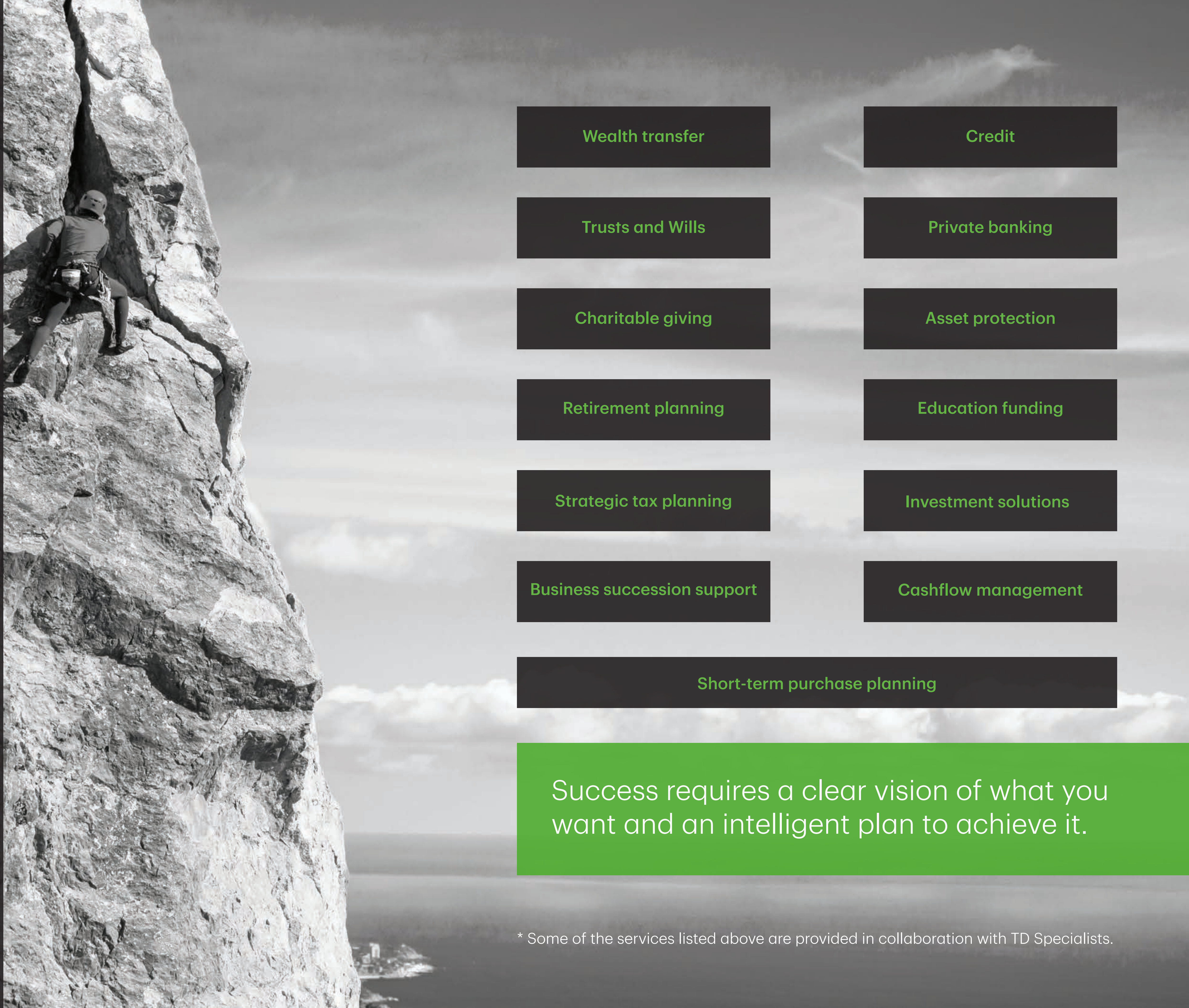
You are the architect of your legacy and we can help you with the blueprint. We'll collaborate with you to identify your top priorities and help you optimize the transfer of your wealth.

You decide where you want your wealth to take you

We map the route to help you get there.

Our practice is built on strong communication because we believe that robust relationships produce better results. We will listen to your needs and map out a personalized plan to help you succeed.

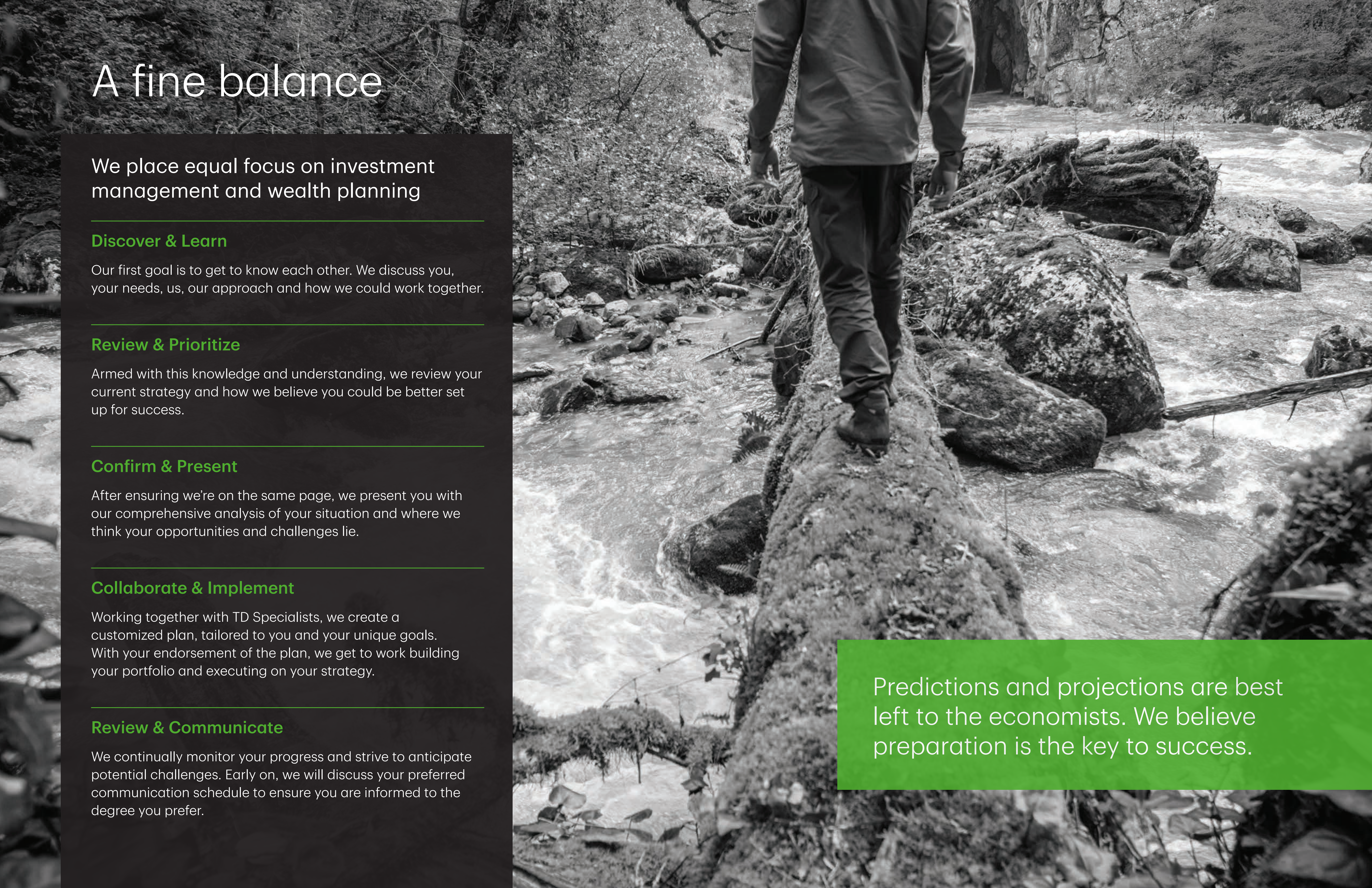
Using our years of experience and proven strategies, we strive to empower you to achieve your goals. Our goal is to communicate clearly and motivate our clients during the difficult, emotional or important times.



- Wealth transfer
- Credit
- Trusts and Wills
- Private banking
- Charitable giving
- Asset protection
- Retirement planning
- Education funding
- Strategic tax planning
- Investment solutions
- Business succession support
- Cashflow management
- Short-term purchase planning

Success requires a clear vision of what you want and an intelligent plan to achieve it.

* Some of the services listed above are provided in collaboration with TD Specialists.



A fine balance

We place equal focus on investment management and wealth planning

Discover & Learn

Our first goal is to get to know each other. We discuss you, your needs, us, our approach and how we could work together.

Review & Prioritize

Armed with this knowledge and understanding, we review your current strategy and how we believe you could be better set up for success.

Confirm & Present

After ensuring we're on the same page, we present you with our comprehensive analysis of your situation and where we think your opportunities and challenges lie.

Collaborate & Implement

Working together with TD Specialists, we create a customized plan, tailored to you and your unique goals. With your endorsement of the plan, we get to work building your portfolio and executing on your strategy.

Review & Communicate

We continually monitor your progress and strive to anticipate potential challenges. Early on, we will discuss your preferred communication schedule to ensure you are informed to the degree you prefer.

Predictions and projections are best left to the economists. We believe preparation is the key to success.

We share your passion to succeed

Jason Casagrande, CIM®, CFP®, FSCI®, FMA

Investment Advisor

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Jason knew from an early age that he wanted to work in wealth management. He began investing personally at age 17 and lived abroad after graduating from university, launching his financial services career in Australia. Jason has worked at several of Canada's largest financial institutions throughout his two decade career.

Living and working abroad, Jason gained perspective on the different ways people think money and approach their financial lives. He believes the keys to sound wealth management advice are high standards, critical thinking and mutual respect. His calm and pragmatic approach has proven beneficial at work and at home with a busy family.

Jason graduated from the University of Western Ontario with a degree in Economics. In addition, he holds the Certified Financial Planner (CFP®), Chartered Investment Manager (CIM®), Fellow of the Canadian Securities Institute (FCSI®) and Financial Management Advisor (FMA) designations.

Jason excels in a team environment, adapts quickly to unforeseen circumstances and is an approachable leader, all skills enhanced by years of experience in competitive sports. His natural curiosity makes lifelong learning an important part of both his personal and professional life. In everything he does, Jason is continually setting higher standards and then working to achieve them.

Omar Hafez, CIM®, CFP®

Portfolio Manager, Investment Advisor

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Omar believes that the cornerstone of wealth planning is recognizing that everyone's financial life and personal situation is unique. He collaborates closely with clients to ensure they receive advice tailored specifically to their needs. This is why he views the discovery process as a vital step – getting to know people, their families or the structure of a corporation or foundation is key to truly understanding the scope of their goals.

Omar holds the Certified Financial Planner (CFP®) and Chartered Investment Manager (CIM®) designations. He is also a Certified Retirement Specialist.

He believes in a comprehensive model that covers the many different aspects of your financial life, from your investment portfolio to your retirement income and you're your estate plan to your kids' education. Omar believes in the value of sound investment advice and his professional life is embodied by the long-term client relationships he's built based on trust and communication.

Omar is an avid runner and has competed in several marathons over the years. He is driven by the discipline the sport requires and the spirit of the races he regularly competes in. Recognizing the power of competition and the importance of giving back, he has also run as a guide runner for visually impaired runners in the city.

Andrea Korre, CIM®

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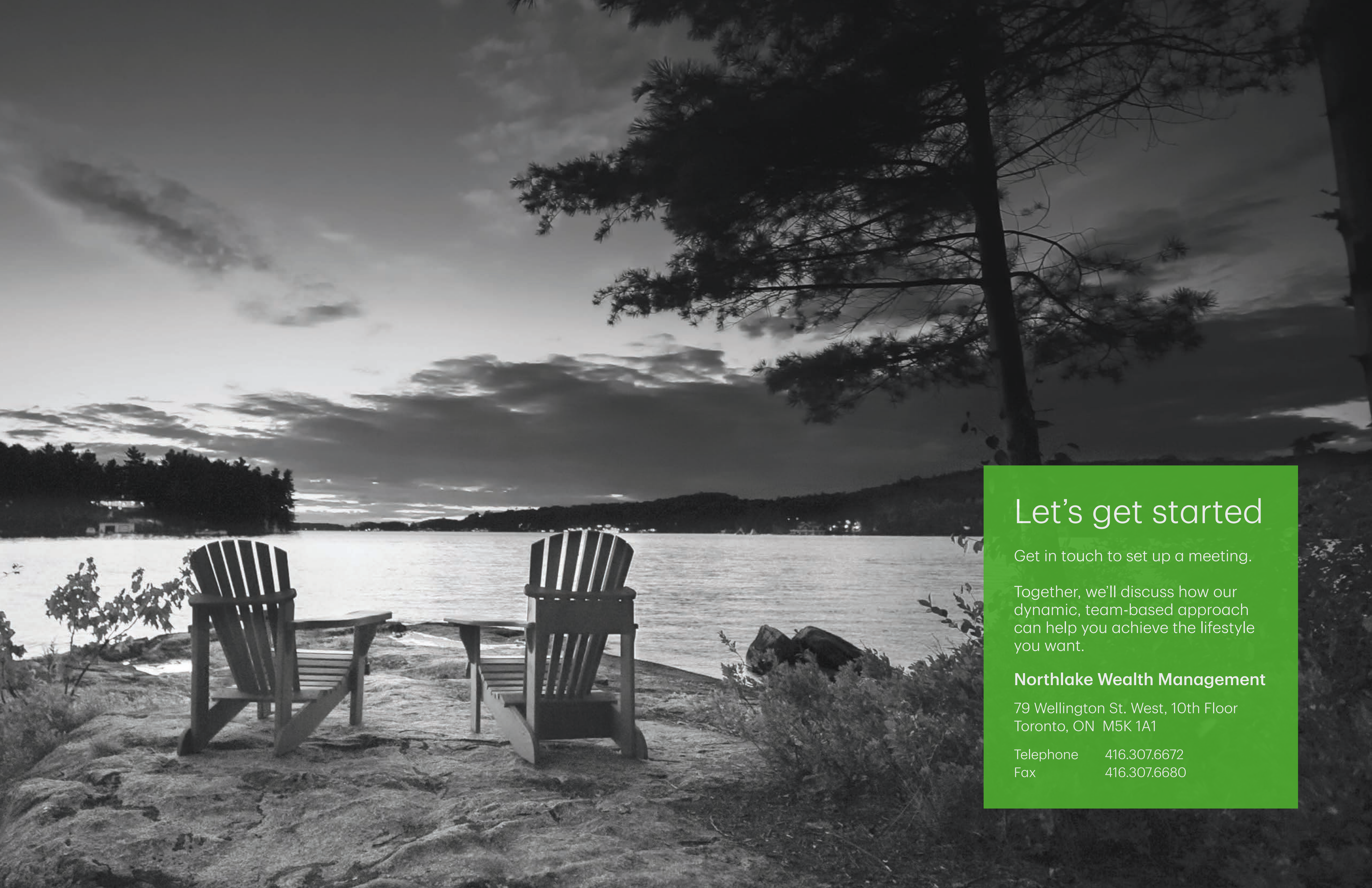
In today's complex, data-driven environment, we believe that our distinct advantage as a team is the ability to think creatively to solve problems.



Let’s get started

Get in touch to set up a meeting.

Together, we’ll discuss how our dynamic, team-based approach can help you achieve the lifestyle you want.

Northlake Wealth Management

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Over the past 155+ years, TD has helped generations of clients with their personal, family and business assets in the ways that matter to them. TD has done this by building strong, transparent relationships and creating integrated, tailored solutions to help people reach their financial goals. TD has operations in 13 countries in North America, Europe and Asia Pacific. In North America, TD banks based in Canada and the U.S. serve customers through nearly 2,500 branches and stores conveniently located across Canada, and from Maine to Florida.

We look forward to discovering what truly matters to you.