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 boarder 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. Throughout my roles, I have gained extensive knowledge in the following areas: estate and retirement planning strategies, tax minimization strategies, 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. I have completed the Personal Financial Planner (PFP®) designation and many other courses. These courses include, Canadian Securities Course (CSC), Branch Compliance Officer (BCO), Conduct and Practices Handbook (CPH), and Wealth Management Essentials (WME). I am currently in the process of completing my Chartered Investment Manager (CIM®) designation.