TD Wealth

About Me

As a Portfolio Manager, I am passionate about making a difference in my clients' lives. Within the community, I believe in advocating for causes that matter and within the investment industry I strive to raise the bar as investors deserve a higher level of advice and service. As I learn about your story, you will also have the chance to hear mine below.

In 2006, I began my career in the financial services industry in Vancouver where I was selected amongst five other candidates to join one of Canada's largest credit union as a Youth Team Program Ambassador. My fascination with saving and investing grew as I began to understand the power of compound growth, using leverage responsibly and creating a disciplined strategy to achieve your wealth goals.

During this time, I enrolled at Simon Fraser University and graduated in 2011 with a Bachelor of Business Administration with a Major in Finance and Economics. While completing a full-time degree, I worked as often as I could to gain experience in progressively higher roles.

Continually striving to expand my experience, I joined an independent brokerage firm working for a large team of advisors. Shortly after, I was approached by a globally recognized asset manager and I worked as an Associate until 2015 covering nearly 150 advisors and planners in British Columbia. I was fascinated with the firm's global investing capabilities and the world of capital markets and this motivated me to pursue the rigorous and demanding Chartered Financial Analyst (CFA) designation which I received in 2016.

My passion to help people and build long-term relationships attracted me to accept an offer with a bank-owned brokerage as an Associate Investment Advisor. Upon receiving my CFA designation, I felt strongly about using my skillset and education where it was a mandatory job requirement and this led me to the world of Private Investment Counsel in Victoria.

TD Wealth approached me in 2017 and I formally partnered with my colleague Anna Nemeth, Vice President and Senior Portfolio Manager in 2018 where we jointly manage one of the largest private client teams on Vancouver Island.

My personal interests include world travel with my husband, cooking and exploring BC with our Labrador.