

A black and white photograph of a large, leafy tree in a field. The sun is setting behind the tree, creating a bright starburst effect. The field is filled with tall grasses and shrubs, and the sky is clear.

Fee Schedule

We charge a set percentage of assets under management (AUM) fee for our tailored investment management service and wealth planning advice. The fee schedule is tiered, resulting in a lower overall fee as AUM increases.

Our fee structure is transparent, easy to understand, predictable and aligns the interest of both the advisor and the client – there are no hidden costs.

If there are any additional charges for a requested unique service, this would be disclosed to you before you make any commitments.

Access to TD Specialists as part of our planning process comes at no cost. Comparatively, we strive to keep costs competitive and in-line with our competitors

Non-Registered Personal and Corporate accounts may have the ability to deduct the full investment management fee for tax purposes.

As a Portfolio Manager, my goal is to add significant value by keeping you on track toward your goals and helping you navigate through volatile markets. As my client, I will help you understand and avoid some of the product and fund-level fees that are common in the investment management industry.