TD Wealth

Our Investment Approach

At Windsor Essex Wealth Group, we start with an in-depth discovery meeting to learn what matters most to you and your family or business. From there, we take a disciplined approach to building your investment strategy. We create a portfolio based on your stated goals – one tailored to your needs, risk tolerance and lifestyle.

Our proprietary asset allocation models focus on helping you generate consistent returns, while recognizing and mitigating potential risks.

These models may include stocks, bonds, exchange-traded funds (ETFs), mutual funds, separately managed accounts and guaranteed investment certificates (GICs). We utilize both active and passive portfolio management strategies and believe in tactical rebalancing as economic and market conditions change.

We take full advantage of the considerable strength and resources that TD offers, including equity research, economic analysis and the expertise of other TD Specialists.

We offer both advisory and discretionary investment solutions complemented by a full suite of wealth management strategies to help meet your needs.

Our discretionary capabilities help provide:

- The opportunity to react nimbly to take advantage of potential opportunities
- A research-based risk management framework based on discipline and a proven process
- The freedom that trust allows – leaving your investment decisions to us means you can live your life knowing your wealth is in good hands

Our distinctive approach is driven by what matters most to you.

The Windsor Essex Wealth Group is most suitable for business owners and families who meet one or more of the following criteria:

- Investable assets exceeding $750,000
- Personal Income exceeding $150,000
- Combined family income exceeding $250,000

Learn more.

Windsor Essex Wealth Group
TD Wealth Private Investment Advice

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