TD Wealth

Sorra

Wealth Management Group

# Your values, your future

At Sorra Wealth Management Group, everything we do is driven by your goals. We take the time to understand what matters most to you and your family before building a tailored strategy that aligns with your values — through both the day-to-day responsibilities and longer-term strategic planning.

We want to know what motivates you, what keeps you up at night and how you envision your ideal lifestyle. Our role is to help you make that lifestyle a reality — day after day, year after year. This means we execute on your wealth strategy with diligence and care, drawing on the specialized expertise of the broader TD team when appropriate.

Your financial life has many moving parts — all unique to you and your family. Our goal is to help you identify and optimize each part so they work seamlessly together, in active pursuit of your goals.

# Integrated strategies for every life stage

## Building net worth

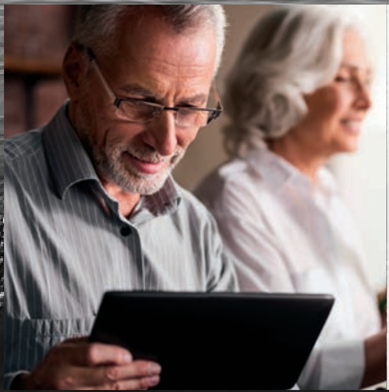
We know how important it is to build your wealth so you can enjoy life’s priorities and achieve your vision for the future.

Working together we can develop innovative strategies to help grow your net worth by identifying which credit strategies and investment solutions match your current lifestyle and needs.

## 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.

We’ve got the expertise to create a comprehensive plan that’s right for you.



## 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 tax advisors, we’ll create an integrated wealth strategy to help reduce tax exposure and keep income available when you need it.

## 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.

# Your financial HQ

We've been working with affluent families for more than two decades. No matter how complex your situation or how intricate your wealth needs, we believe we've got the experience and resources to support you.

We build complete wealth plans that are truly personal — driven entirely by you and your goals.

Our time-tested process starts with understanding what matters most to you — your core values. From there, our disciplined approach ensures we remain aligned with these values through day-to-day execution and ongoing long-term strategic planning.

Here's what you can expect working with us.

## 1 Discovery

Take time to understand your situation, goals, ambitions and concerns. Life is constantly evolving, so this is an ongoing part of the process.

## 2 Confirmation

Summarize in writing everything we've learned during Discovery to ensure we are aligned.

## 3 Strategy

Build your integrated strategy based on the short- and long-term goals we've established.

## 4 Implementation

Execute on each stage of your wealth strategy, drawing on the expertise of select TD Specialists when appropriate.

## 5 Review

Monitor progress and make adjustments based on changing lifestyle needs, mitigating risk or taking advantage of potential opportunities.

## 6 Communication

Regular discussions to ensure you comfortable, confident and well-informed about your current circumstances and progress toward your goals.

As your lead relationship manager, we recognize that success is in the details.

# Your future is much more than your investment portfolio.

Whether it's tax planning, transitioning your business or broader discussions about your family's future, we are here to support you at each stage of your wealth journey. Working with a skilled team of TD Specialists, we offer our clients the following integrated suite of services.

- Investment management
- Asset protection
- Private banking
- Retirement planning
- Education-savings support
- Custom credit services
- Strategic tax planning
- Charitable giving & philanthropy
- Insurance strategies
- Business succession support
- Trusts and Wills
- Wealth transfer
- Cash-flow management

# Experienced professionals dedicated to you

## Peter Sorra, FMA, FCSI®

Vice President, Investment Advisor & Certified Retirement Specialist

TD Wealth Private Investment Advice

T: 416 279 1447 | peter.sorra@td.com

Peter has been providing integrated wealth management advice to individuals, families and business owners for more than 20 years. He joined TD in 2004 and thoroughly enjoys working with the many long-term clients he serves.

Peter is dedicated to helping take the stress out of his clients' financial lives. His mission is to provide customized wealth strategies and the highest level of personal service, all delivered with the utmost professionalism.

He graduated from the University of Toronto in 1990, and holds the Financial Management Advisor (FMA) and Certified Retirement Specialist (CRS) designations. He has been an Advisor at TD since 2004, and was promoted to Vice President in 2010. In addition, he became a Fellow of the Canadian Securities Institute (FCSI®) in 2010, the highest credential offered by the organization.

Peter lives in the Beaches area of Toronto with his wife, Jill, and three university aged children. As a former athlete and entrepreneur in the personal wellness industry, Peter remains dedicated to health and exercise through volleyball, downhill skiing, waterskiing, hiking and biking.

## Patrick Luongo

Client Service Associate

TD Wealth Private Investment Advice

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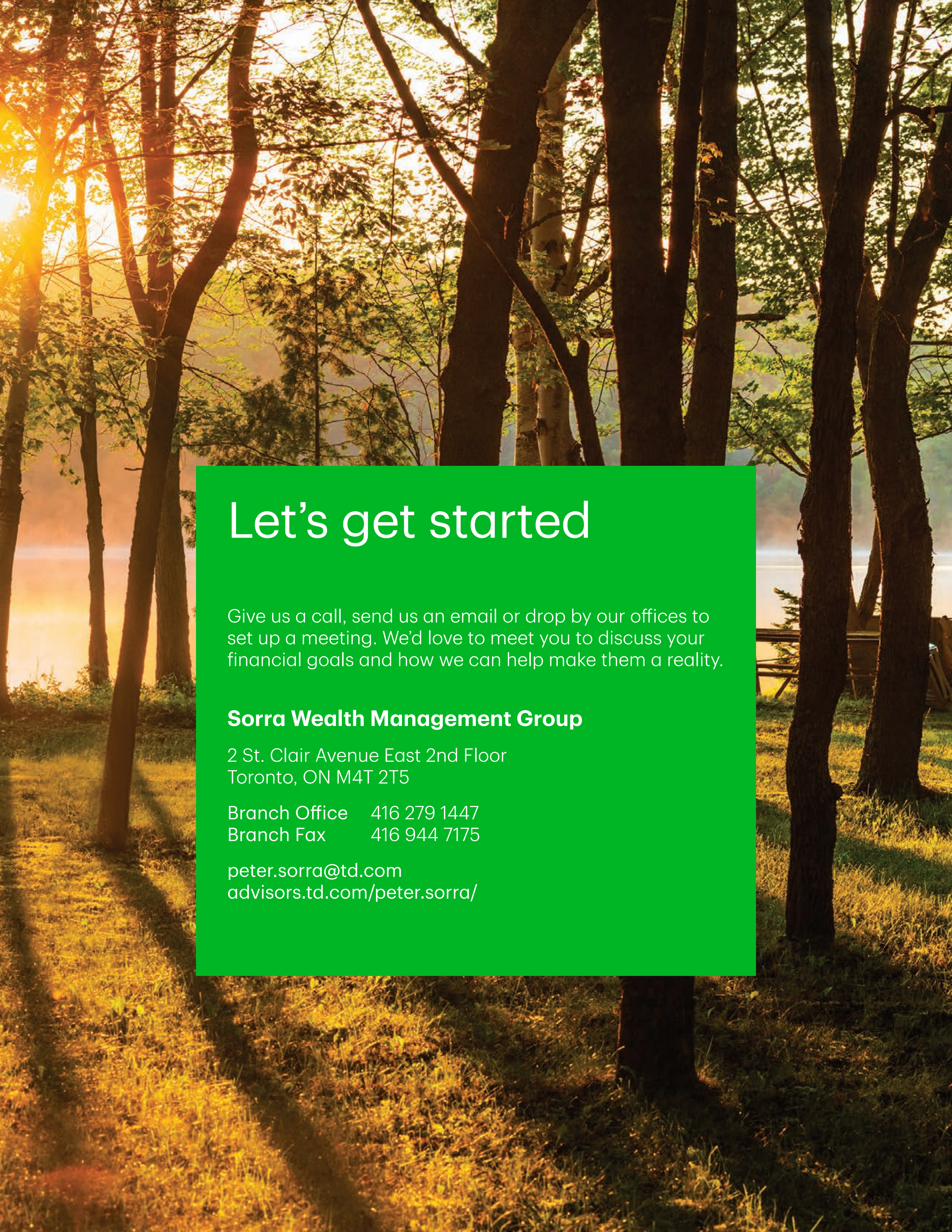
Patrick began his financial services career in retail banking in 2014, where he gained valuable experience in customer service excellence. At the Sorra Wealth Management Group, Patrick is responsible for providing the highest level of day-to-day client service.

He graduated from the Ted Rogers School of Management at Ryerson University with a Bachelor of Commerce (B. Com) and has dedicated himself to ongoing professional development through the Canadian Securities Institute.



# Let’s get started

Give us a call, send us an email or drop by our offices to set up a meeting. We’d love to meet you to discuss your financial goals and how we can help make them a reality.

**Sorra Wealth Management Group**

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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.

We look forward to discovering what truly matters to you.