

TD Privately Managed Portfolios

Spend your time on what matters

At TD Wealth Private Investment Advice, we're committed to understanding your needs and providing you with exceptional investment solutions through every stage of your life.

That's why we have developed a range of managed investment solutions – including TD Privately Managed Portfolios – that put your investments in the hands of professionals so you can devote your time to what really matters to you.

A one-on-one relationship with your Portfolio Manager

With TD Privately Managed Portfolios, your Investment Advisor is also your Portfolio Manager, responsible for building and managing your investment portfolio, as well as making all the day-to-day investment decisions.

With TD Privately Managed Portfolios, two of the key benefits are –

- **A personalized portfolio** – Your Portfolio Manager will sit down with you to understand your financial goals, create a personal profile and put together a customized investment strategy designed to help you meet your goals
- **Direct access** – You have direct access to your Portfolio Manager, which gives you an opportunity to shape the strategy behind the investment decisions being made for you

Understanding your specific needs

Your Portfolio Manager is a dedicated professional who will listen to your needs and work with you to develop a customized investment strategy that's right for the goals you have set.

Your Portfolio Manager will –

- Understand your financial circumstances
- Develop a personal Investment Policy Statement to summarize and document your investment goals
- Implement investment policies and strategies to help you meet those goals
- Measure and monitor your portfolio on an ongoing basis
- Rebalance your portfolio as necessary
- Keep you informed of your progress toward your financial goals



TD Privately Managed Portfolios

A qualified professional working directly with you

TD Wealth Private Investment Advice Portfolio Managers are held to high standards. They must not only hold industry-specific credentials, but also meet our stringent qualifications.

TD Wealth is committed to supporting the success of our Portfolio Managers. We conduct ongoing monitoring to make sure you are receiving a high level of service and professional investment management.

Comprehensive reporting

Monthly statements, quarterly performance reports and year-end reports are sent directly to you to ensure that you know how your investments are tracking to your goals.

Tax planning advantages

With TD Privately Managed Portfolios, you own your securities directly, which gives you the flexibility to develop and pursue an effective tax planning strategy.

One inclusive management fee covers the benefits of TD Privately Managed Portfolios

The management fee you pay on a non-registered plan may also qualify as a tax deduction. Talk to your tax advisor about your specific situation.

Ask about TD Privately Managed Portfolios today.

