TD Wealth

Strategic

Wealth Management

Putting our passions to work for you

Wouldn't it be nice if you had someone who knew exactly what you wanted to achieve with your wealth — and had the energy, knowledge, and experience to help make it happen?

At Strategic Wealth Management, you do.

Everyone's wealth situation is different. Our commitment to our clients, however, is the same: to help you reach your financial goals, and help make your current financial life easier.

That's why we have established a highly collaborative approach to wealth management. Leveraging our distinct areas of specialization, we will strategize a comprehensive wealth solution that is built just for you. Acting as your personal CFO, our ultimate goal is to help you maximize your results and build confidence in your financial life — all while creating long-lasting, mutually enjoyable relationships.

Better together

We believe there is value in specialization.

Offering truly comprehensive wealth management is easier said than done for the simple reason that wealth is complicated.

That's why we have taken a team-based approach to wealth management. By harnessing our individual strengths, we aim to deliver financial care that is comprehensive in its scope, coordinated in its execution, and consistent in its performance.

Whether it's strategizing an achievable financial plan, working to outperform investment benchmarks, or connecting you to the extensive services and specialists available across TD Bank Group, every member of our team is doing what they love, and is driven by the same goal: helping you achieve your dreams.

Cutting through the clutter

Wealth is complicated. We're not.

Our team approach is designed to help ensure that the various aspects of your finances are working together to help you achieve your goals. Here's how we make that happen.

Strategically-focused Financial Planning

We take the time to get a detailed understanding of your needs so that we can create personalized wealth and retirement plans that can help put you on the right track to achieve your goals while also helping to protect your financial future.

Dedicated Portfolio Management

We offer discretionary portfolio management, which frees you from the responsibility of making day-to-day investment decisions and enables us to act decisively when sudden opportunities or risks present themselves.

Guided access to services and specialists

We liaise with specialists across TD Bank Group, bringing you expertise and answers regarding private banking, trust services, estate planning, insurance, business succession planning, charitable giving strategies and more.

Regular, clear communication

In addition to our regular investment updates and reviews, we make ourselves available to explain your portfolio, our investment rationale, stock selection process — or any other question or concern you may have — in terms you can understand.

Our Team Values

Relationships

Getting to know you is the only way we can do our job well.

Integrity

We value the trust you place in us and put your needs first.

Honesty

We speak candidly and don't shy away from difficult topics.

Helping Others

We genuinely care about our clients' lives and our community.

Happiness

Your happiness is the best measure of success.

Your success is our success

We invest the majority of our own money and that of our families alongside our clients, using the same investment process and securities.

We follow a disciplined, evidence-based investment process developed and improved upon over our many years working in this industry. No matter what the market is doing, our goal is to maximize performance, effectively manage risk and minimize fees.

Performance

Money is emotional. Our rules-based investment process is engineered to avoid common investment mistakes by eliminating emotional bias and conflicts of interest.

- We will help you make decisions that we feel are in your best interests.
- We will help identify your financial blind spots and ensure that your goals align with your values.
- We will help you through the certainty of uncertainty, and find the smartest place to access your money when you need it.
- We will help identify the dangers, opportunities and strengths that exist to help you achieve your financial goals.

Fees

We manage money for clients on a discretionary basis and charge a fee for service that is fair, reasonable and transparent. In most cases, the fee is lower than alternative fee structures.

Wealth management made easy

Let us help you simplify your financial life.

Working closely with our banking collaborators and liaising with your trusted advisors (lawyers, accountants, family members, etc.), we will coordinate a wealth strategy that encompasses your various needs, including:

- Retirement income planning strategy
- Wealth protection and insurance strategy
- Investment strategies, covering active and passive management and private equity
- Optimal tax planning, considering the use of personal or family trusts
- Liquidity forecasting and cash management planning
- Custom credit facilities to take advantage of opportunities that can help grow and diversify your wealth
- Wealth transfer strategies
- Efficient business succession planning strategy
- Private foundation creation* and management, or other philanthropic initiatives

* The services of the Private Giving Foundation, an independent, non-profit charitable corporation, are offered in co- operation with TD Wealth.

A dynamic team

Integrated solutions start with an integrated team.

Each member of our close-knit team of seasoned investment professionals brings a different perspective and a distinct area of specialization to the table.

Together we will guide you to the solutions we believe are best-suited to your needs, while attending to the details that can make the difference between plateau and growth, money lost and money saved, dream forgotten and dreams realized.

Jennifer Tretina Nelson, FMA

Investment Advisor

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"The cornerstone of my practice is my one-on-one relationships with my clients, based on trust, communication and a detailed understanding of their needs."

Jennifer brings over 20 years of experience in the investment industry to her role as an Investment Advisor with Strategic Wealth Management, where she works tirelessly to build mutually enjoyable, long-lasting relationships by helping to simplify her clients' financial lives. She holds the Financial Management Advisor (FMA) designation and is a Certified Retirement Specialist.

Born and raised in Belleville, Jennifer is passionate about the community she lives in. Through her work as a Rotarian and with the YMCA Strong Kids Campaign, she strives to make her community a great place to work and play — for her family and everyone who lives here.

When she's not working or volunteering, Jennifer can usually be found outdoors — travelling, spending time with family, or dreaming up her next adventure.

John Stockton, CFA, B.Sc.

Portfolio Manager

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"I am passionate about helping my clients make money, so they can build the life they want and achieve their goals."

John is a licensed Portfolio Manager and CFA charterholder who works directly with high-net-worth investors and their families. His goal is to deliver consistent returns that outperform benchmarks, effectively manage risk, and help clients reach their goals.

Born and raised in Toronto, John has resided in the Belleville area since he entered the investment industry in 1995. In addition to his investment qualifications, John has a Bachelor of Science in Chemical Engineering from the University of Ottawa and is a member of the CFA Society Toronto.

When John isn't at the office, he enjoys spending time with his wife and their three sons. He also enjoys skiing and scuba diving — almost as much as managing money.

Kristine Broek

Client Service Associate

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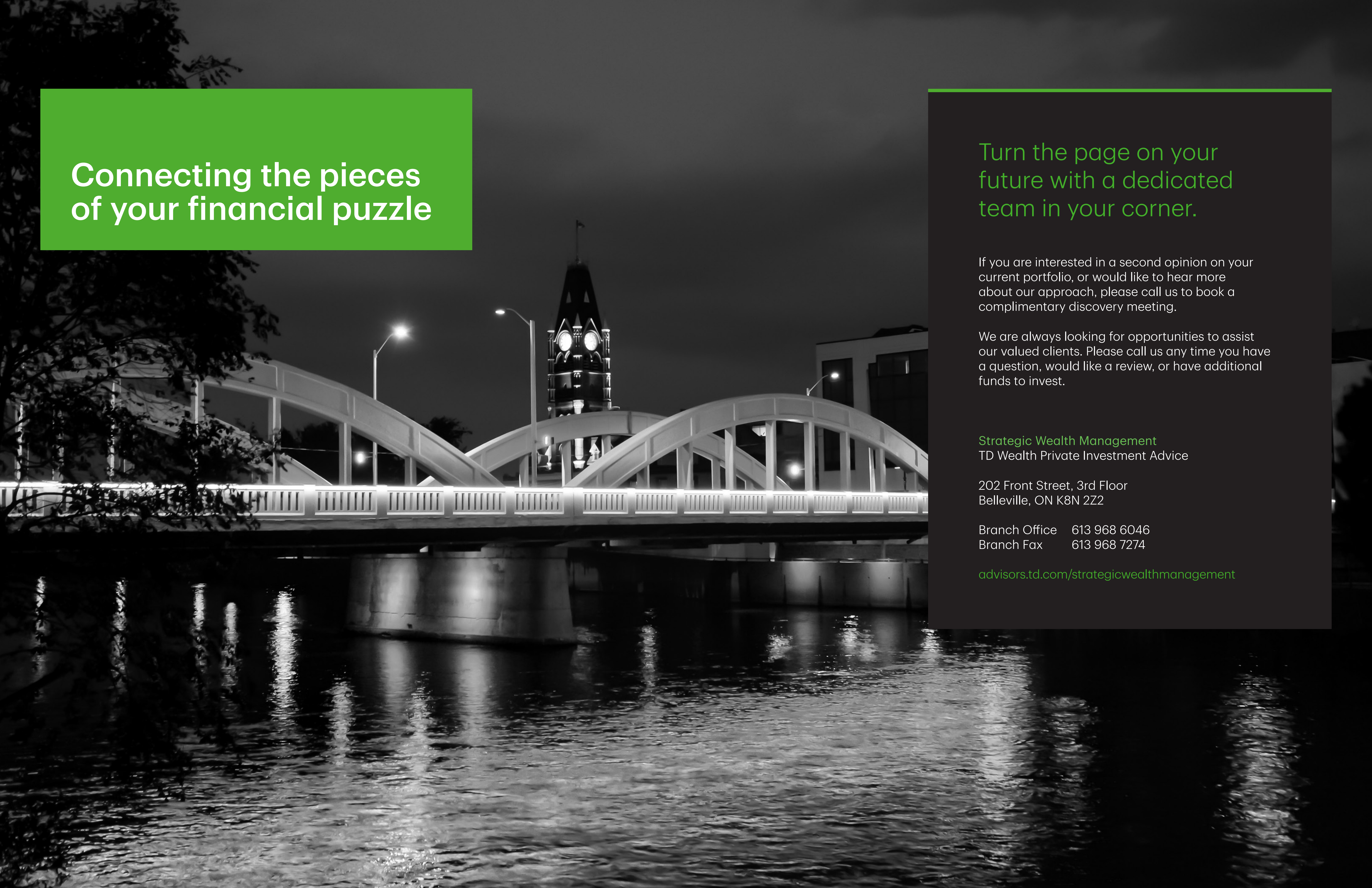
"Helping make the lives of our clients easier is my daily goal."

Kristine began her career in the financial services industry in 2002. Kristine is an integral part of our team ensuring that the administrative needs of our clients and their portfolios are looked after. She is known for providing exceptional client service by striving to exceed expectations.

Born and raised in Frankford, Kristine now calls Tweed home where she lives with her husband and 2 children. She and her husband built their house there years ago as they both enjoy the great outdoors.

When not at work, Kristine loves spending time with her family outdoors.



Connecting the pieces of your financial puzzle

Turn the page on your future with a dedicated team in your corner.

If you are interested in a second opinion on your current portfolio, or would like to hear more about our approach, please call us to book a complimentary discovery meeting.

We are always looking for opportunities to assist our valued clients. Please call us any time you have a question, would like a review, or have additional funds to invest.

Strategic Wealth Management
TD Wealth Private Investment Advice

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We look forward to discovering
what truly matters to you.

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