TD Wealth

Wealth Road Map

January – February
- Risk Tolerance & Objectives Review
- Registered Plans
- Market & Portfolio Review

March – April
- Taxes & Tax Packages
- Will, Estate & Insurance Planning Strategies

May – June
- Will, Estate & Insurance Planning Strategies
- Market & Portfolio Review
- TFSA Contributions

July – August
- Retirement Income Planning, continued
- Market & Portfolio Review

September – October
- Retirement Income Planning, continued
- Market & Portfolio Review

November – December
- Review any new short term financial priorities for next year
- Communication Preference Review

The **Kluge**
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