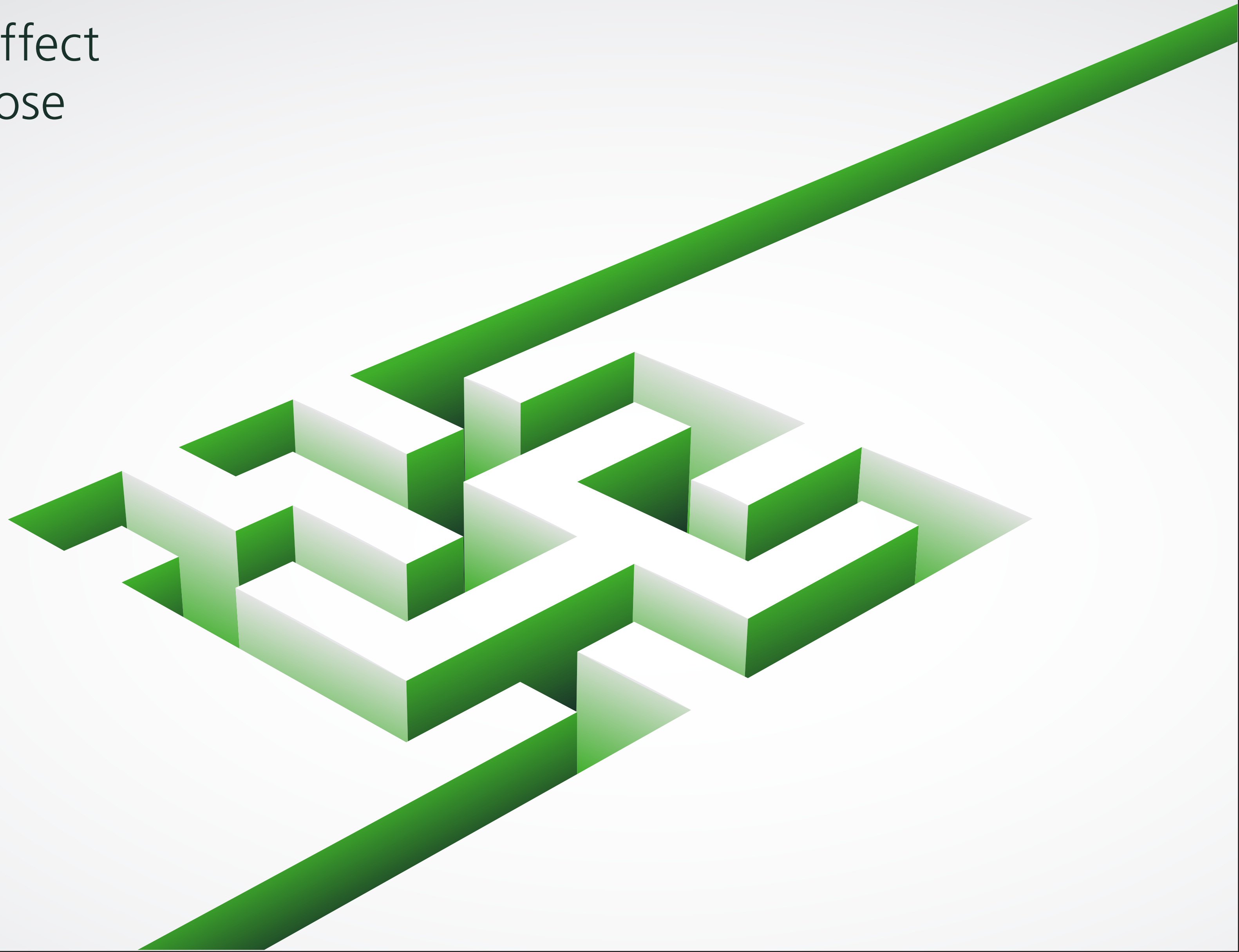
TD Wealth

Jackman Wealth Advisory

Making decisions that will affect your life, and the lives of those you care about, is a deeply personal experience.



Our Commitment to You

Wealth advice is too important to buy off a shelf. We are all different, and we all deserve advice that is relevant to our situation, aspirations and values. Something so important should be personal to you, and a personal touch requires a deeper understanding.

We will utilize a distinct Discovery Process to get to the heart of what matters—the hopes, dreams and goals of you and your family—to shape and build your personal wealth strategy and help achieve your personal vision of success. Once your strategy has taken shape, we will collaborate with a team of highly-qualified TD Specialists to put your plan into action and monitor its success.

Whether you're building your business, shifting into retirement, or planning your legacy, we'll work with you throughout your journey.

We will provide insightful counsel, disciplined planning and effective risk management to help you make more informed, confident decisions that can help you keep your ideal future in focus.

We look forward to working with you and your family toward building a better life and a brighter legacy.

Sincerely,

Brad Jackman, BA, FCSI®, CIM®
Vice President, Investment Advisor
TD Wealth Private Investment Advice

Rajan Dhot, BBA
Associate Investment Advisor
TD Wealth Private Investment Advice

Discovering You

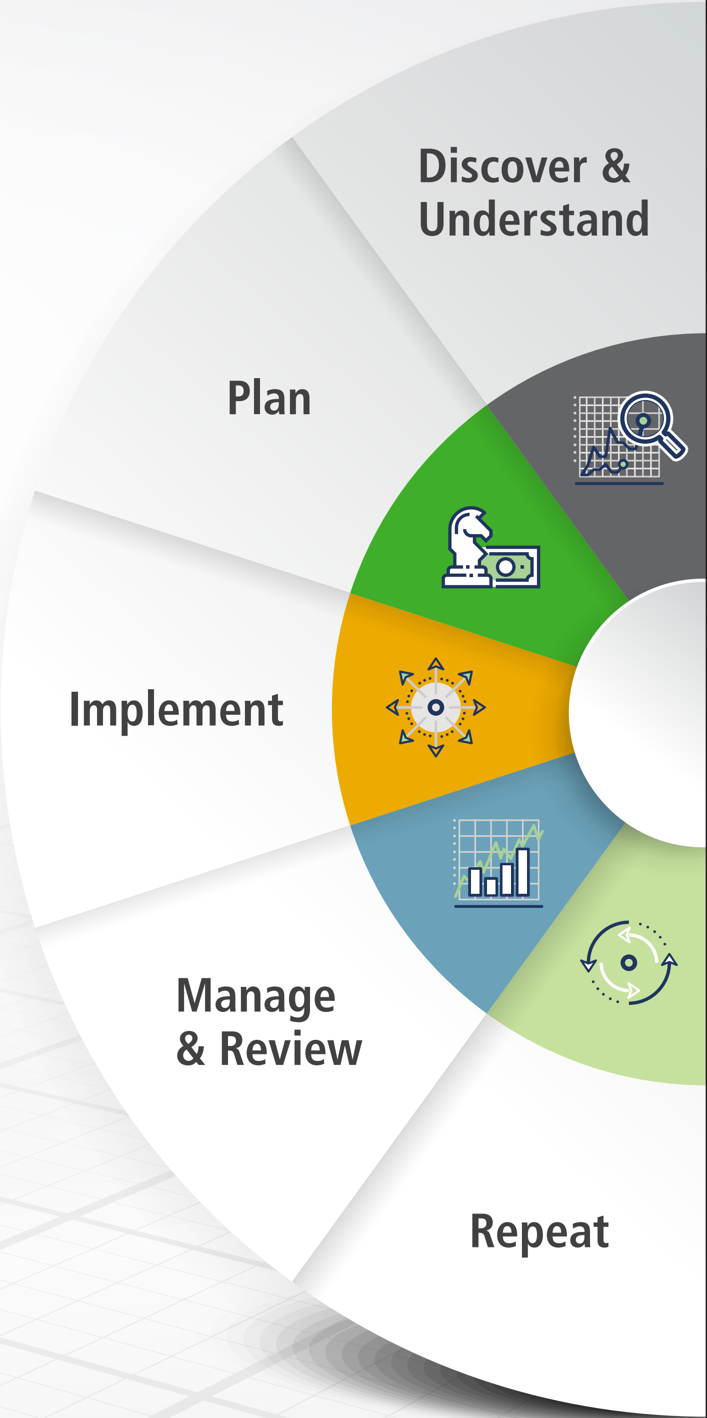
What does success mean to you?

Your vision of success will be at the center of how we work together. We will take the time to fully discover **YOU** before creating a Wealth Strategy to help achieve your vision of success, whatever that may look like.

Managing considerable wealth can be complicated. Using our distinctive approach, we seek to view your life through your eyes. With a deep understanding of your priorities, we build a Wealth Strategy rooted in your goals and based on our principles of transparency and trust. But we don't do this only once. It happens each time we connect, to help us stay in tune with your needs and the needs of those you care about.

It is our goal to:

- fully uncover the vision and values that you hold true and that are key to your plans for the future.
- engage a core team of TD specialists, as well as those you already have in place, to contribute their expertise in the design of a Wealth Strategy unique to you.
- put your Wealth Strategy into action.
- continue to review and regularly reconnect with you and those you care about to rediscover what might have changed and how it may impact what you had envisioned for your future.




It is important to ensure that your entire financial health is being considered.

Your Lead Relationship Management Team

Depending on your needs, Jackman Wealth Advisory will build you a dedicated team of TD specialists who will work collaboratively to develop your personal Wealth Strategy.

Whether you're just building your career or business, divesting of a business, shifting into retirement or retired, our insightful counsel, disciplined planning and effective risk management can help make you more confident in your decisions, and more focused on your future.

Rajan Dhot, BBA
Associate Investment Advisor

Brad Jackman, BA, FCSI®, CIM®
Vice President, Investment Advisor

Christine Jackman
Client Service Associate

Karen Goddard
Client Service Associate

Meet Brad Jackman

Brad Jackman, BA, FCSI®, CIM®
Vice President, Investment Advisor
TD Wealth Private Investment Advice

Investment returns are only one aspect of your financial health. This is the core idea behind Brad's advice, and what he believes to be the key to his and his clients' success for over twenty years. Brad's approach is similar to that of a corporate CFO: he seeks a deeper understanding of your finances, and the dreams and goals that guide them.

Once informed, he develops your Personal Wealth Strategy—an in-depth plan that helps identify and manage risk, determine asset allocation, preserve your wealth and aids in our goal of improving your returns. It's a deeply-informed, personalized way to improve your financial health.

Brad joined TD in 2008 after moving from Toronto, where he began his career with CIBC Wood Gundy. He holds a BA in Economics from Brock University, Ontario, and has studied at Boston College and the Wharton School of Business in Pennsylvania.

Brad's passions include skiing and travelling with his family, enjoying great food, and playing golf and ping pong with his son, Tristan. He and his family are proud contributors to The Canadian Kidney Foundation, Operation Smile and The United Way.

Meet Rajan Dhot

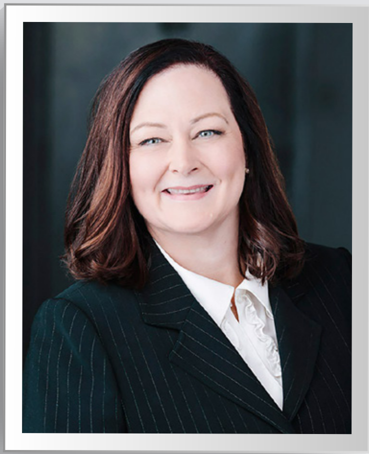
Rajan Dhot, BBA
Associate Investment Advisor
TD Wealth Private Investment Advice

Changes to your financial picture can be some of the most exciting parts of your journey, but they can also be an overwhelming part of life. It is for these moments that Rajan has developed his dedication to providing personalized and accessible advice at each step. Rajan's "success at each step" approach is founded on his passion for creating solutions during his clients' most challenging endeavours.

This approach helps eliminate uncertainty during the most financially vulnerable stages of your life. Rajan takes the ever-changing economic trends head-on by being tactical and proactive with your wealth planning. It is this philosophy that ensures support through both your financial and personal growth.

Rajan joined TD in 2016 and holds a BBA in Accounting and Finance from Simon Fraser University and has studied at the University of British Columbia. Fluent in both English and Punjabi, he specializes in implementing wealth strategies for professionals and business owners. He is a proud contributor to the Surrey Memorial Hospital Foundation and United Way, is a fan of music and collecting vinyl records, mountain biking, and spending quality time with family and friends.

Meet Karen & Christine



Karen Goddard

Client Service Associate

Managing all administrative services for our team, Karen is responsible for trade processing, helping with investment-related tax slips, appointment scheduling and ensuring all clients receive the best possible service experience.

Karen's career began in 1986 in Saskatoon with BMO Nesbitt Burns. Moving to the west coast in 2006, she joined Scotia McLeod, finally transitioning to our team in 2009. Karen has completed the Canadian Securities Course.

Karen's passions include sewing, gardening, golf, and spending time with her husband and two dogs.

Christine Jackman

Client Service Associate

Joining Jackman Wealth Advisory in 2017, Christine is responsible for tracking and acknowledging milestone events in our client's lives, event planning and coordination, as well as assisting with marketing initiatives. She has been a major influence in reminding us how deep our relationships are with our clients and that success is measured by more than just investment returns.

Christine's passions include running, biking, gardening, home decor and organization, volunteering at her children's school as well as spending time with her husband and two children, Tristan and Olivia.

TD Specialists Services & Support

Tax & Estate Planning
Nairika Varza, LL.B.
TD Wealth

Insurance & Estate Planning
Ross Hagen, CLU, ChFC
TD Waterhouse Insurance Services

High Net Worth Planning
Oana Papuc, LL.B.
TD Private Wealth Management

Business Succession Planning
John Nicolls, B. Comm., LL.B.
TD Wealth

Private Banking
Shelly Stamatiou, PFP
TD Wealth

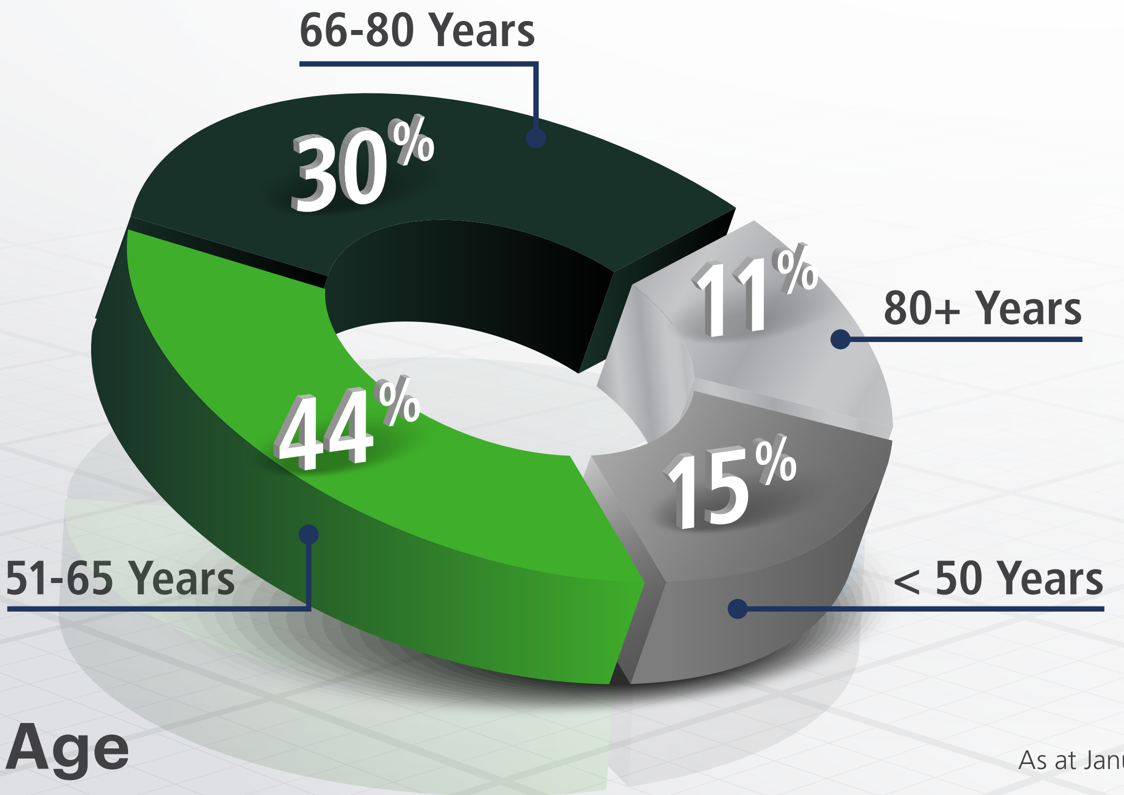
Commercial Banking
Jocelyn Fajardo
TD Commercial Banking

Minimum Asset Thresholds may be required to access specific Specialists

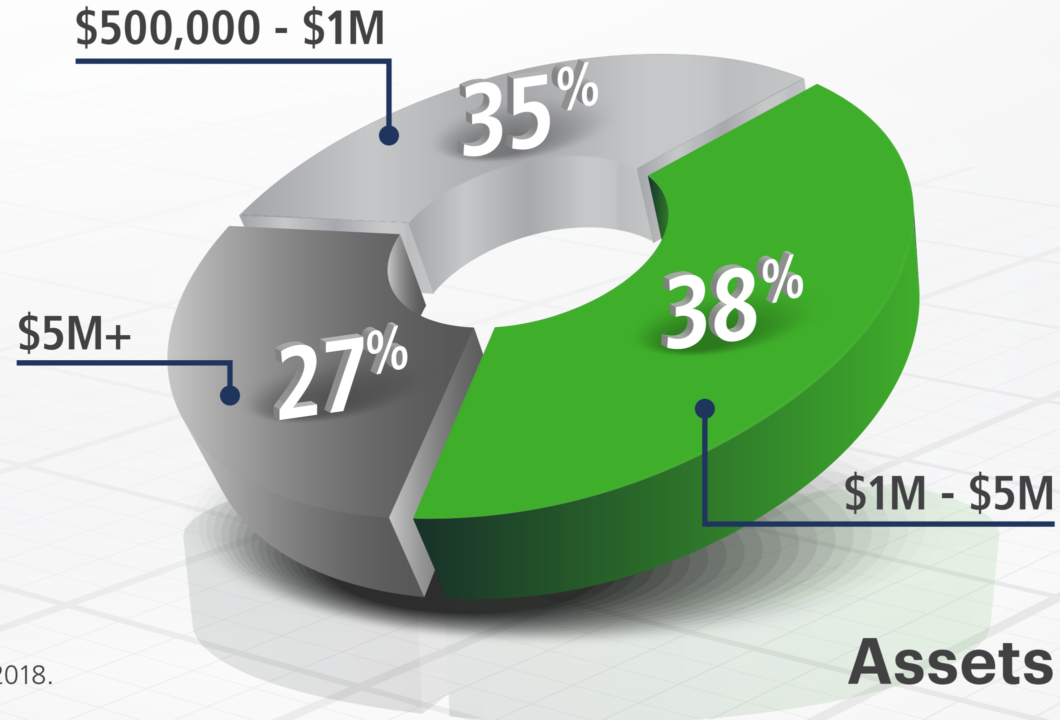

A goal without a plan is just a wish.
— Antoine de Saint-Exupréy

Meet Your Fellow Clients

Clients from all walks of life have entrusted us to act as stewards of their wealth. Our client base includes professionals, business owners, retirees and families with considerable investible assets and wide-ranging, often complex financial needs.



Age

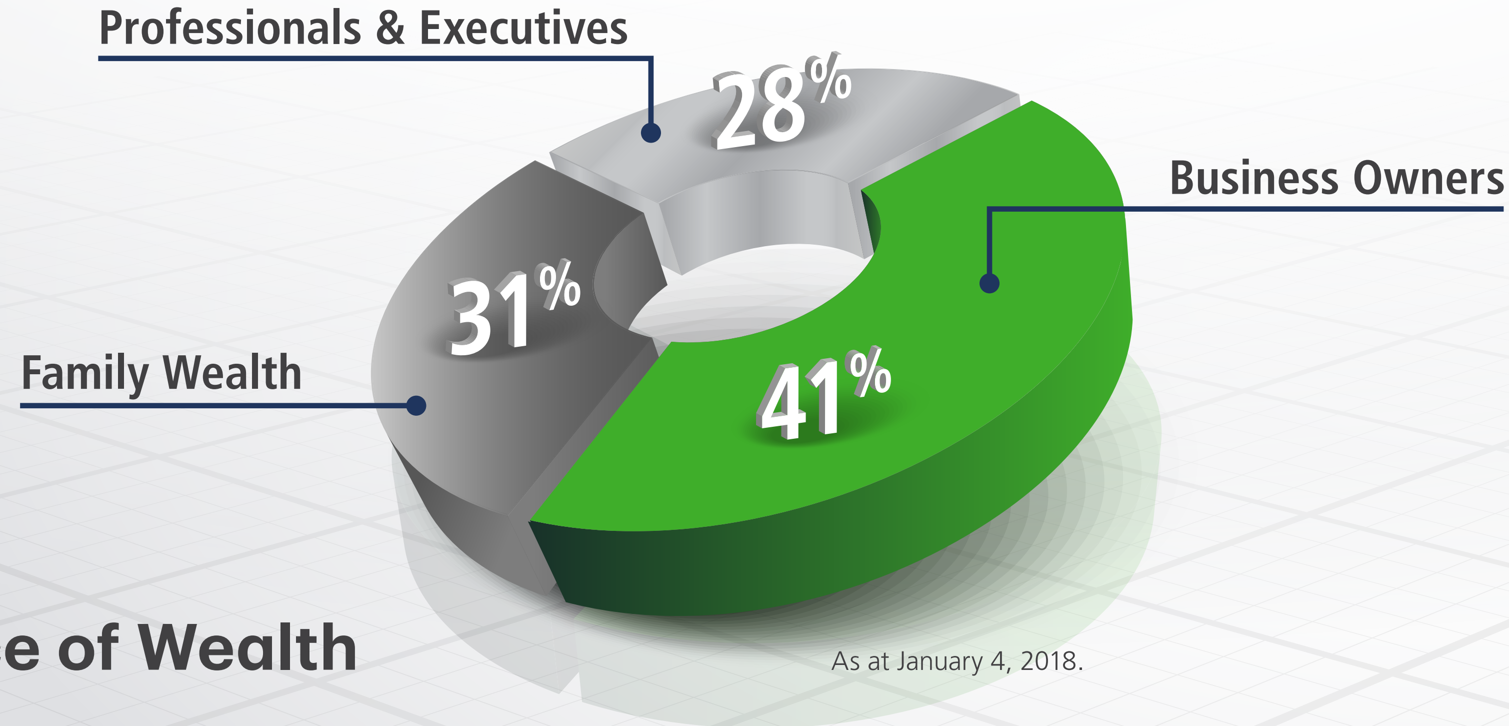


Assets

As at January 4, 2018.

Meet Your Fellow Clients

We currently have multi-generational relationships with over 1/3rd of our client base. These long-term relationships and an understanding of our responsibilities in acting as stewards of our clients' wealth is the essence of what makes us unique and gives us our purpose.



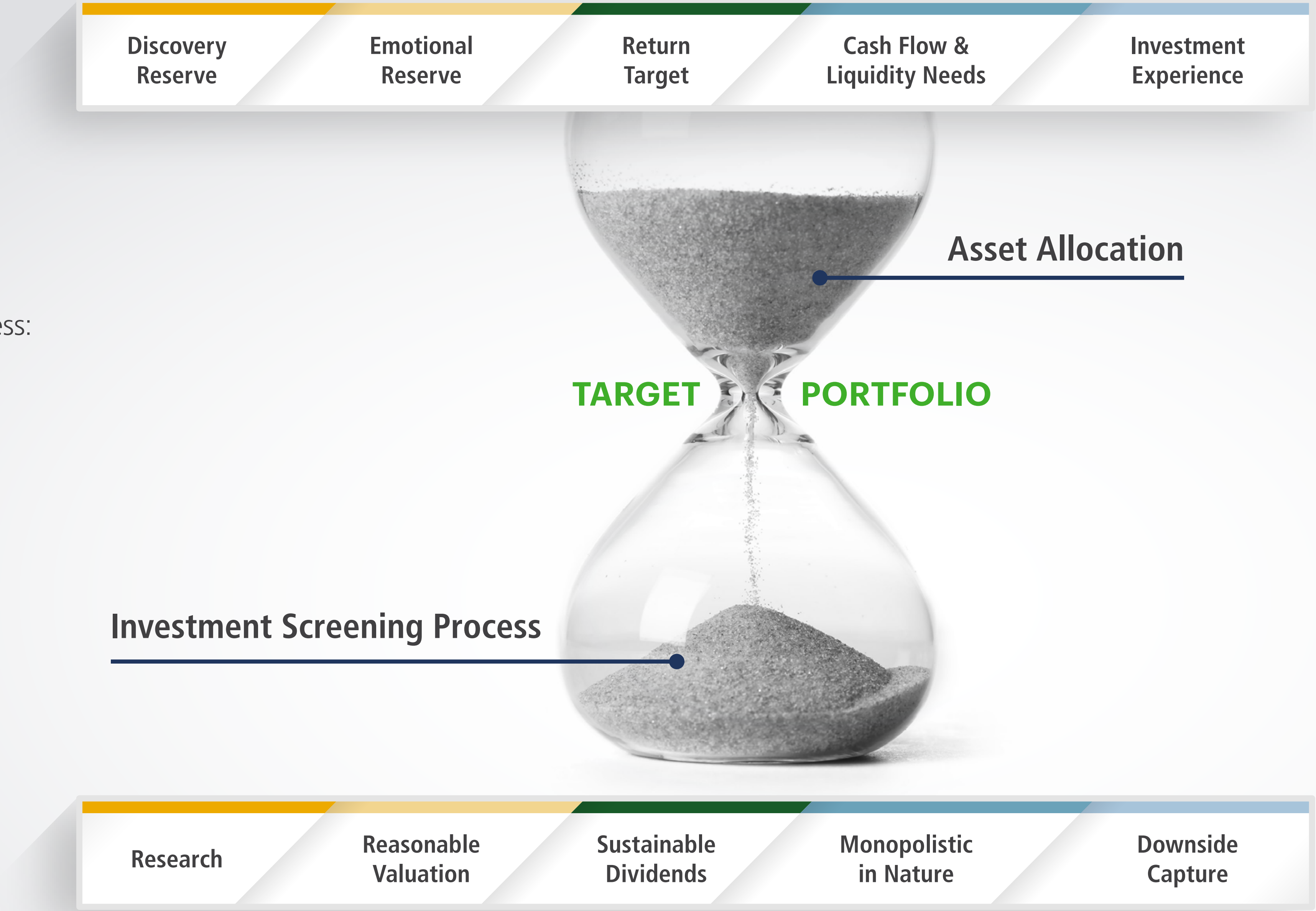
Source of Wealth

As at January 4, 2018.

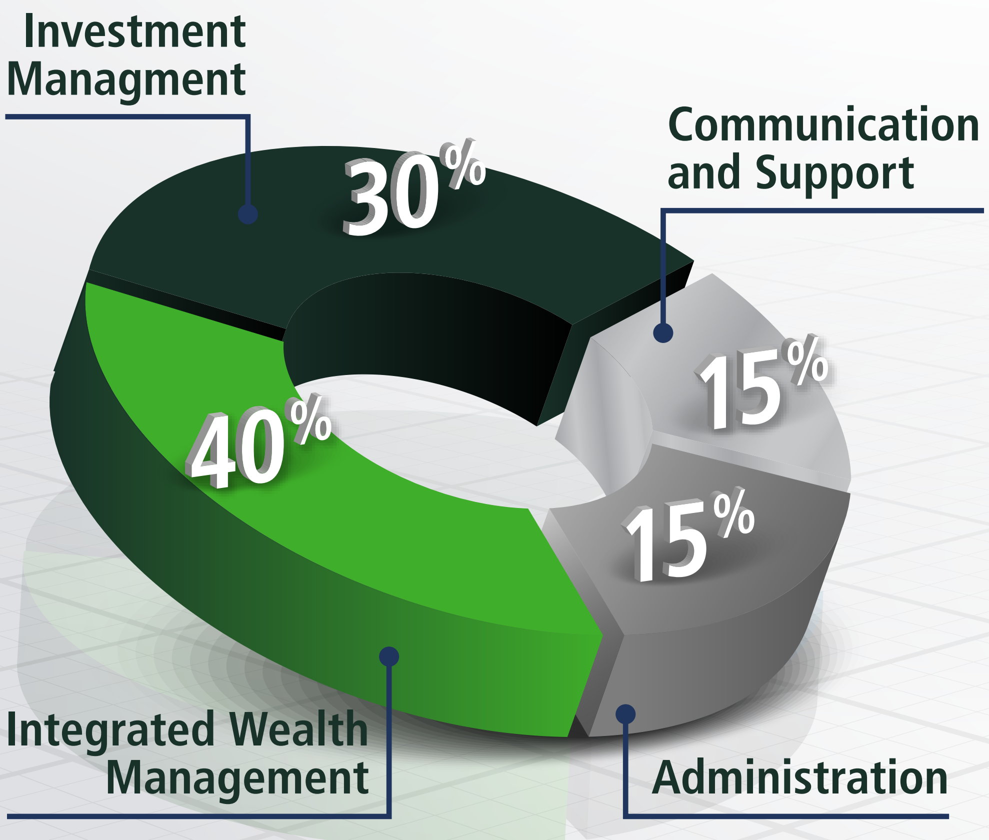
Investment Beliefs

Framed around your personal goals and inspired by our expertise, these three rules guide our investment process:

1. Manage risk.
2. Maximize tax-efficiency.
3. Minimize downside exposure, then maximize returns.



Wealth Management Services



INTEGRATED WEALTH MANAGEMENT*

- Develop a personal Wealth Strategy
- Monitor progress with goals-based reporting
- Retirement planning
- Tax and cash flow analysis
- Net Worth analysis
- Insurance Strategies
- Estate & Philanthropic Strategies

INVESTMENT MANAGEMENT

- Establish an Investment Policy Statement
- Analyze investment options
- Assess market conditions
- Implement a customized portfolio
- Conduct ongoing risk management
- Provide guidance and perspective

COMMUNICATION & SUPPORT

- Support through major life events
- Support through volatile markets
- Face-to-face meetings
- Access by phone and email
- Access to firm wide resources
- Client educational and appreciation events
- Online access

ADMINISTRATION

- Account set-up and transfers
- Cash flow and banking assistance
- Annual tax package preparation
- Monthly account consolidation reporting
- Records management

For illustrative purposes only.
*Certain services are offered in collaboration with TD Specialists

TD Wealth
Private Investment Advice

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A Better Life.
A Brighter Legacy.

JackmanWealthAdvisory.com