Bytown | Wealth Management

Meet the team

George Marsh, FCSI®, CFP®, CIM®, FMA

Portfolio Manager & Senior Investment Advisor
T: 613 783 5110 **E:** george.marsh@td.com

George began his career in the financial services industry in 2000 and has built a thriving Ottawa-based practice. He specializes in providing dedicated support and bespoke solutions for the complex needs of affluent individuals and families. As a Portfolio Manager and Senior Investment Advisor, George leverages his experience to ensure that his clients have the tools, advice and confidence they need in order to help them reach their goals.

George holds the CFP®, CIM® and FMA designations.

Brad Myers, PFP®

Associate Investment Advisor
T: 613 783 5195 **E:** brad.myers@td.com

As an Associate Investment Advisor, Brad works with affluent individuals and families to deliver custom wealth management plans. Brad started in capital markets in 1997 and has since specialized in working with high-net-worth families. Brad focuses on understanding our clients' financial needs and building customized plans that address unique needs related to investments, retirement planning, estate planning strategies and alternative investment solutions.

Brad holds the PFP® designation and is licensed to advise and trade options.

Charles Adams, CFP®

Associate Investment Advisor
T: 613 783 2013 **E:** charles.adams@td.com

Charles has been in the financial services industry since 2007 and joined TD Wealth Private Investment Advice in 2015. He has extensive capital markets experience and works closely with our high-net-worth clients to understand their big picture. As a holder of the Certified Financial Planner designation, Charles supports our clients with all their planning and long-term strategy needs, developing customized financial plans that address retirement planning, education planning and investment solutions.

Charles holds the CFP® designation and is licensed to advise and trade options.

Jake Easby

Client Service Associate
T: 613 783 5116 **E:** jake.easby@td.com

Jake started at TD Wealth in 2019 and joined Bytown Wealth Management in 2021. He focuses on ensuring operational efficiency and assisting our team in providing a seamless client experience. Jake is continually advancing his knowledge through industry training and professional development courses that enable him to provide support and expertise to our clients by answering questions and providing context.

Jake holds a Bachelor of Business degree in Finance and Economics from St. Francis Xavier University.

Bytown Wealth Management
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Committed to providing a meaningful wealth management experience

Get in touch

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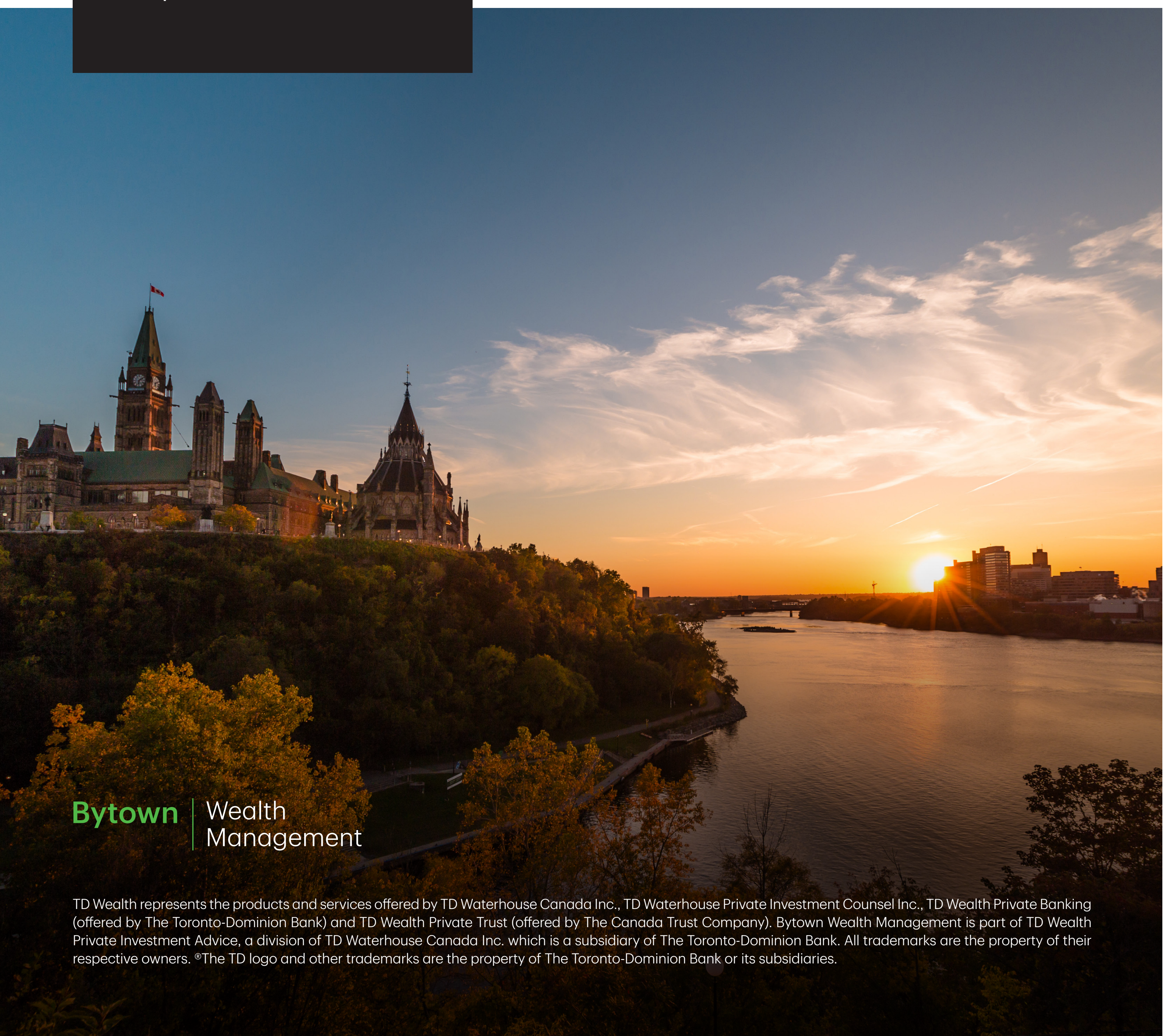

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