

Wealth
Management
for Every
Chapter of
Your Life



TD Wealth |



Navigating Challenges, Building Dreams



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With over 15 years of experience in the financial industry, I'm proud to serve as a Senior Investment Advisor, dedicated to helping you achieve your financial goals and dreams here in Canada. I hold a Bachelor of Commerce in Finance (High Honors), an MBA, and the CIM® and CFP® designations.

In addition to holding the Certified Financial Planner (CFP®) designation, I am also a Life Insurance Advisor with TD Wealth Insurance Services. I work closely with TD specialists - a group of seasoned professionals with 20-30 years of experience - to offer a wide range of insurance solutions from different providers. Whether it's life, critical illness, or travel insurance, I help ensure clients receive guidance tailored to both their financial goals and protection needs.

Outside of work, I enjoy reading, cooking, singing, running, traveling, and spending time outdoors—especially boating, hiking, camping, and RV trips with my family. I believe these personal interests give me a well-rounded perspective and help me connect more meaningfully with my clients.

Building a secure financial future in Canada comes with unique challenges. Whether you're a business owner, a professional, or someone planning for a secure retirement, navigating Canada's financial landscape often feels complex.

I've been through it myself. When I moved to Canada, I faced the same uncertainties—adapting to a new financial environment and building long-term wealth. These personal experiences, combined with my professional background, have shaped my mission: to empower clients with tailored solutions for every stage of life.

It's important to me that the financial strategies I create reflect not only numbers and goals, but also your values and lifestyle. I take pride in my work, striving to deliver consistent results for high-net-worth clients while guiding them through each stage of their financial journey. My goal is to help you preserve, grow, and protect your wealth—so you can move forward with confidence.



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Helping you achieve your vision of success



Building net worth

Implementing tax-efficient strategies

Protecting what matters

Leaving a legacy

Building net worth

We know how important it is to build your wealth so you can enjoy life's priorities and achieve your vision for the future. Working together we can develop innovative strategies to help grow your net worth by identifying which credit strategies and investment solutions match your current lifestyle and needs. Our team of professionals can work with you to develop an effective plan to help you make your vision a reality.

Implementing tax-efficient strategies

You've worked hard to accumulate your wealth and we want to help you to make the most of it. Working closely with you and your tax advisors, we'll create an integrated wealth strategy that will structure your investment portfolio to help reduce tax exposure and keep income available as and when you need it.

Protecting what matters

Life is filled with uncertainty and that's why we're committed to delivering advice and solutions to help protect the things you value at every life stage. Whether through comprehensive risk strategies or connecting you with a specialist in trusts, estates and other risk mitigation products, we've got the expertise to create a comprehensive plan that's right for you.

Leaving a legacy

You are the architect of your legacy and we can help you with the blueprint. We'll collaborate with you to identify your top priorities, from estate planning and trusts to gifting and philanthropy. Our goal? To help you optimize the transfer of your wealth.

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Tailored Solutions

Our approach is simple: we prioritize your goals and values to create customized wealth solutions for your unique journey. Through TD Wealth's extensive network, we provide a comprehensive suite of services.

- Strategies to help protect your assets and grow your wealth.
- Navigating tax-efficient and estate strategies.
- Helping you fund education, plan retirement, and achieve your dreams in Canada and beyond.

Initial Discovery

Our in-depth discovery process focuses on understanding your priorities and goals in order to better support them.

Seamless Onboarding

We will help you transfer funds and structure your investment portfolio through step-by-step onboarding.

Proactive Reviews

Get curated insights, timely updates, and regular reviews of progress towards your goals and adjust as your needs evolve.

Advanced Strategies for High-Net-Worth and Ultra-High Net Worth Clients

We provide advanced strategies tailored for High Net Worth and Ultra High Net Word clients, helping them preserve wealth, optimize complex financial structures, and secure long-term legacies.

Women and Investing

Women and investing wealth is about much more than just numbers and figures. It's about having the power to do what's right for you and your family, the freedom to fulfill your dreams, the flexibility to invest in your business and the assurance that you're prepared for life's ups and downs. Our aim is to protect and grow your wealth and help you make informed decisions throughout your life.

Advanced Tax Strategies

Just as your ambitions are uniquely your own, so too is your tax situation. No single tax strategy will fit all scenarios. Instead, your tax obligations may require a personalized guiding plan with annual consultations with tax advisors as your wealth accumulates or your business evolves.

Securing Your Business

For many of our clients, their businesses represent not only significant wealth but also a legacy of vision, discipline, and success. Guiding these enterprises through succession requires deep insight and strategic approach. Our team brings experience and knowledge to advise on complex business-related financial goals. We help optimize tax and estate strategies, and ensure a seamless transition.

Retirement Planning

During the discovery process, we will discuss strategies to help you become retirement-ready by discussing questions like:

- How much income is needed for the retirement you aspire to?
- How can you save enough to fund your retirement?
- How can you improve tax efficiency during retirement?
- When should you start taking your government benefits?

Estate Planning

Estate Planning is outlining instructions for distributing your assets in case of death or incapacitation. We will guide you on what you can do and the documents you need to help ensure your wishes are fulfilled. A comprehensive estate plan can include various documents, products, and solutions to help ensure your wishes are carried out as intended.



Meet the Team

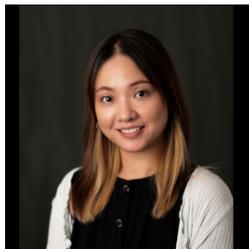


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Let's Connect

Staying up to date with everything happening in the world can feel overwhelming at times. Explore the latest perspectives and market insights on my website—curated to help keep you informed and on track.



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