Tailored Solutions in Tune with Your Needs

TD Wealth

My Mission: Empowering Your Future

Danny Chan
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With over 25 years of experience in the financial industry, I'm proud to serve as a Senior Investment Advisor dedicated to working with you to help you achieve your financial aspirations and dreams.

I hold the CFP® designation, one of the most widely recognized financial planning certifications in the world. As the financial well-being of individuals and families grow more complex, they look for CFP® professionals, the gold standard in Canadian financial planning. CFP® professionals have demonstrated the knowledge, skills, experience and ethics to examine clients' entire financial picture, at the highest level of complexity required of the profession.

My passion for helping clients is complemented by my diverse interests, including reading, working out, traveling, movies, cheering for Oilers Hockey, and especially time with my family—Corinne, Brandon, and Pepsi. This well-rounded perspective brings unique understanding and empathy to my client relationships, enabling me to craft personalized financial strategies tailored to your needs.

Building a secure financial future in Canada presents unique challenges. Whether you are a business owner, professional, or planning for retirement, navigating Canada's financial landscape can often feel complex.

With 25 years of experience, I have guided clients through all aspects of financial planning, including financial management, investments, retirement, insurance, estate, and tax planning—engaging TD specialists when needed. These experiences, combined with my expertise, shape my mission: to empower clients with tailored solutions for every stage of life.

Whether you are planning for retirement, funding your children's education, or building a legacy, I am committed to helping you navigate your financial journey with clarity and confidence.

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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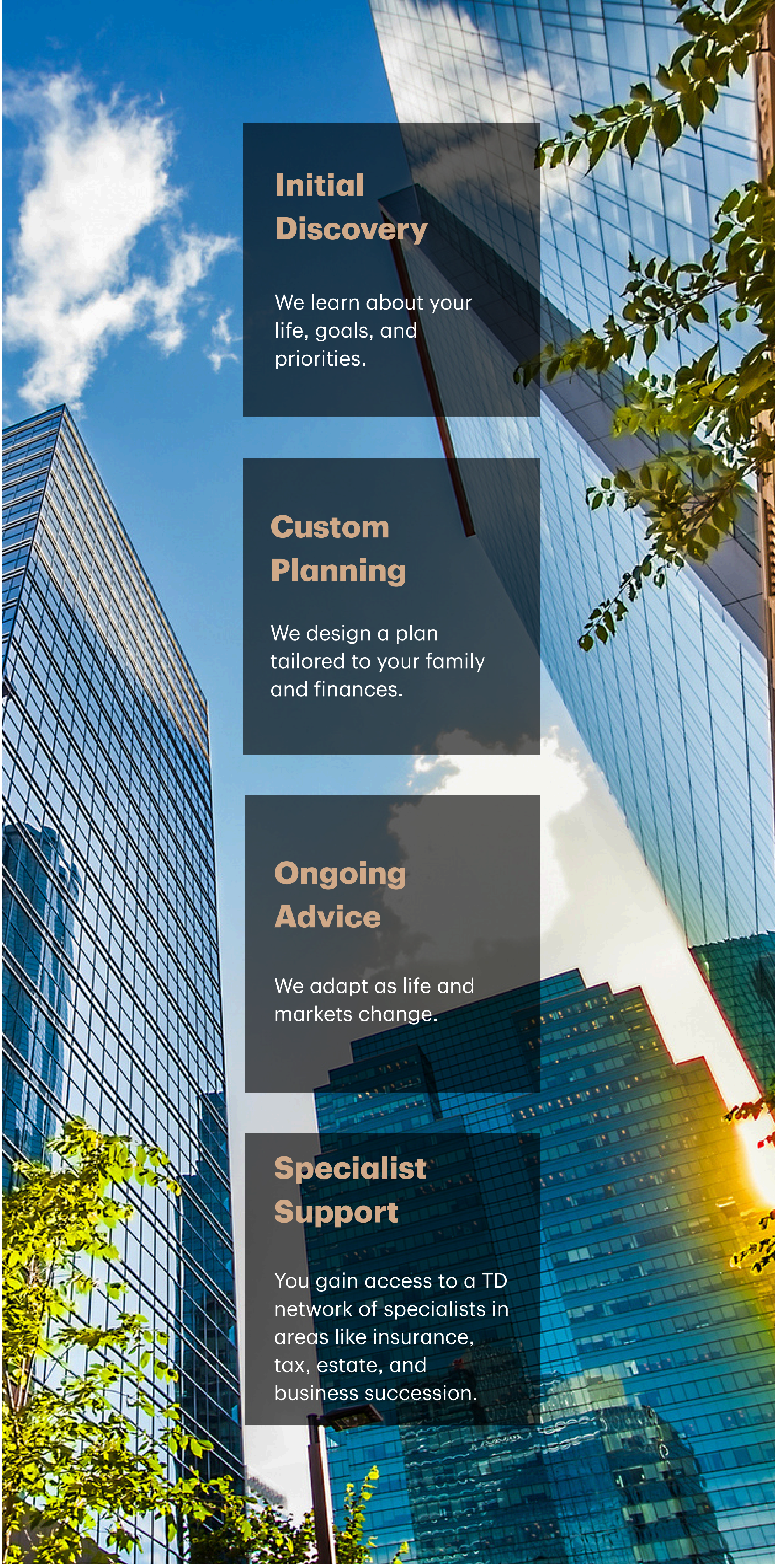
Tailored Solutions

We will work together to help you manage, grow, and protect your wealth. Our tailored services are designed to help meet your unique goals and priorities - no matter how complex they are.
We'll help you identify your priorities and create a plan to address your specific needs. We can help with:

- Protecting your assets
- Maximizing your charitable giving
- Finding tax strategies and solutions
- Arranging your estate and trust planning



Initial Discovery

We learn about your life, goals, and priorities.

Custom Planning

We design a plan tailored to your family and finances.

Ongoing Advice

We adapt as life and markets change.

Specialist Support

You gain access to a TD network of specialists in areas like insurance, tax, estate, and business succession.

Tailored Investment Solutions

Our portfolio management begins and ends with a well-defined investment philosophy, a determined portfolio construction process and a robust commitment to risk management. We believe investing should reflect your unique needs — your lifestyle, your values, and your long-term goals.

Our disciplined, research-driven investment philosophy is designed to help protect and grow wealth in all market conditions, while supporting your broader financial plan. Our planning process helps bring focus to your overall goals and offers strategies to help you achieve them, no matter what life stage you're in.

Analysis

Analyze the strengths and vulnerabilities of your current situation and present course of action and uncovers potential alternative strategies to consider.

Evaluation

Evaluate whether your current savings and strategies are appropriate to meet your financial goals.

Collaboration

Leverage a team of specialists at TD covering areas such as insurance, tax and estate planning as well as business succession planning.

Recommendations

Give you actionable recommendations to help achieve your goals.

Wealth-building Strategies for now and the years ahead

Business Succession Planning

Moving on from a business you've created and nurtured can be very difficult. You want to know it will get the same attention you've put into it, if not more. You can expect us to help create a succession plan that outlines your expectation for the continuity of your business.

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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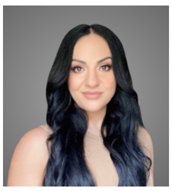
Manager
TD Wealth Private Trust



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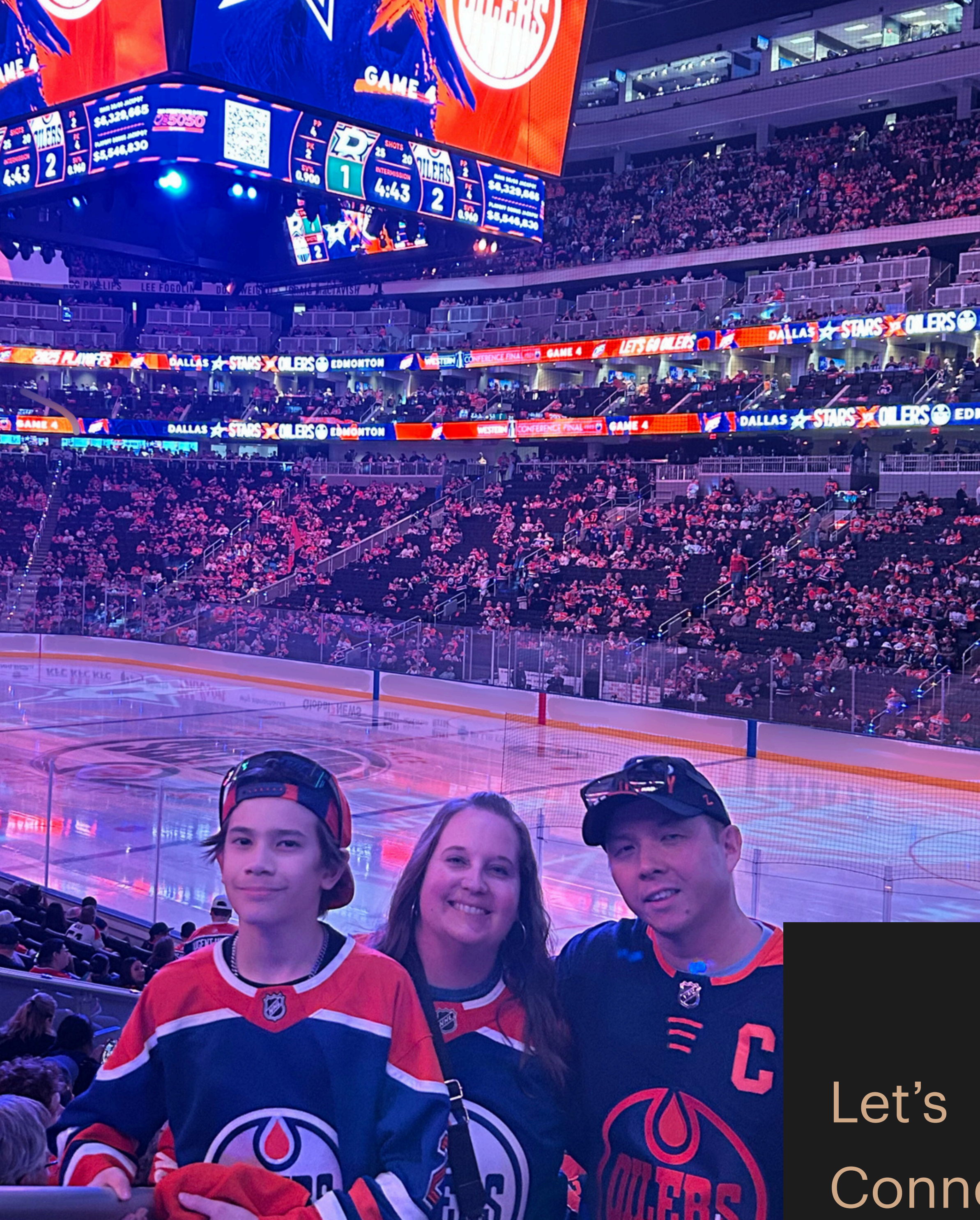

Let’s Connect

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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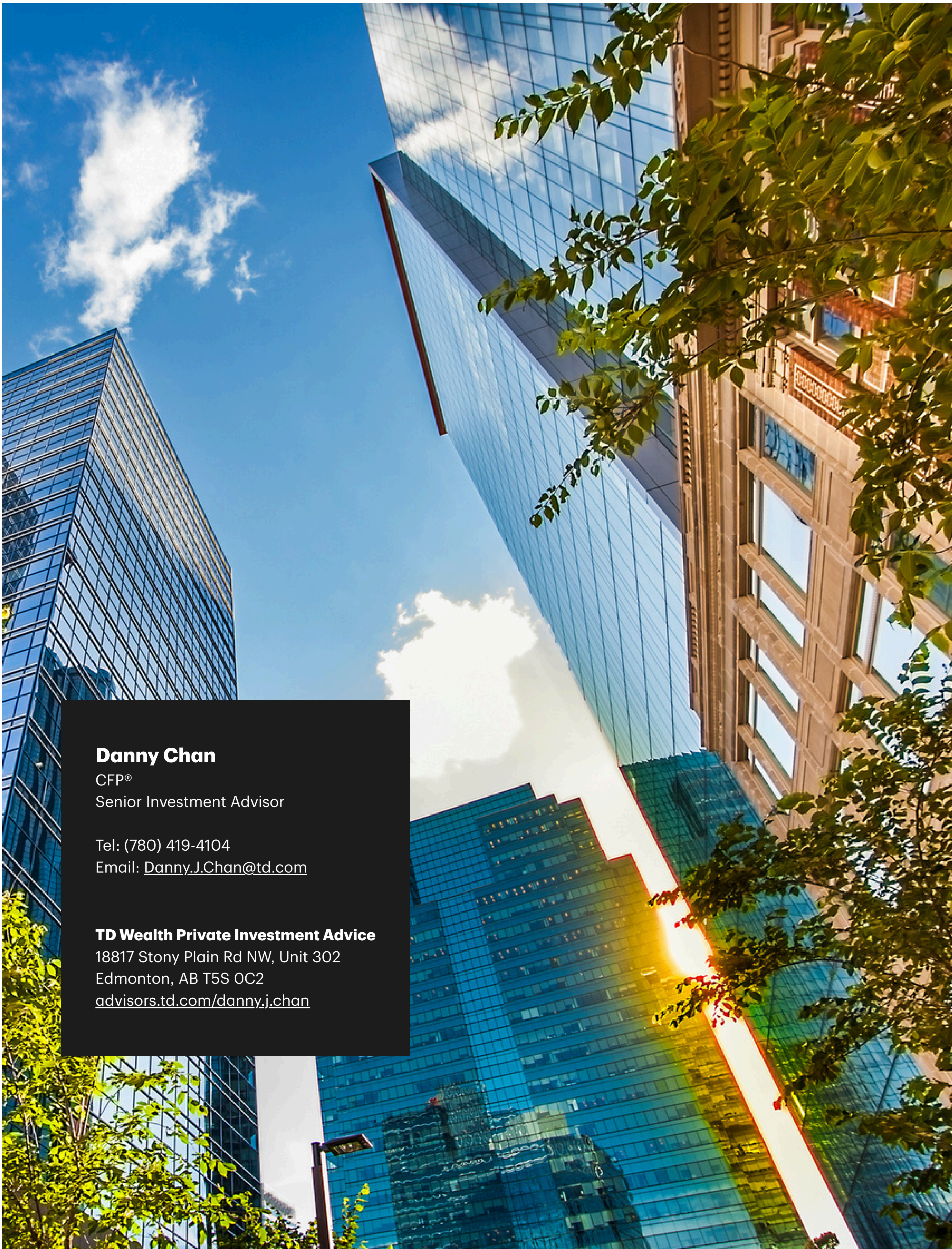

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