Two Decades of Advice in St. Albert and Surrounding Communities

TD Wealth

My Mission: Guiding You with Clarity and Confidence

Ben Foster
B.Comm., CFP®, FCSI®, CIM®
Senior Investment Advisor
Tel: (780) 460-3562
Email: Ben.Foster@td.com

TD Wealth Private Investment Advice
18817 Stony Plain Rd NW, Unit 302
Edmonton, AB T5S 0C2
advisors.td.com/ben.foster

Beginning my career in equity research at an international brokerage firm, I have spent the last 20 years helping high-net-worth families and business owners in the St. Albert and surrounding communities reach their personal and financial goals.

Raised in St. Albert, I work and live in the community alongside my wife and two children. I am active in sports, love to travel and give back to my community as a member of the St. Albert Cosmopolitan Club. I hold a Bachelors degree in Commerce from the University of Alberta and the Certified Financial Planner™ certification offered by FP Canada.

I found my true passion in building long-term relationships and guiding clients through life's most important financial decisions in the past 20 years working with the communities.

My approach has grown alongside the needs of my clients—focused on disciplined investment planning, tax-efficient strategies, and succession planning that help families move forward with clarity and confidence.

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.

Scan or click for more information about us.

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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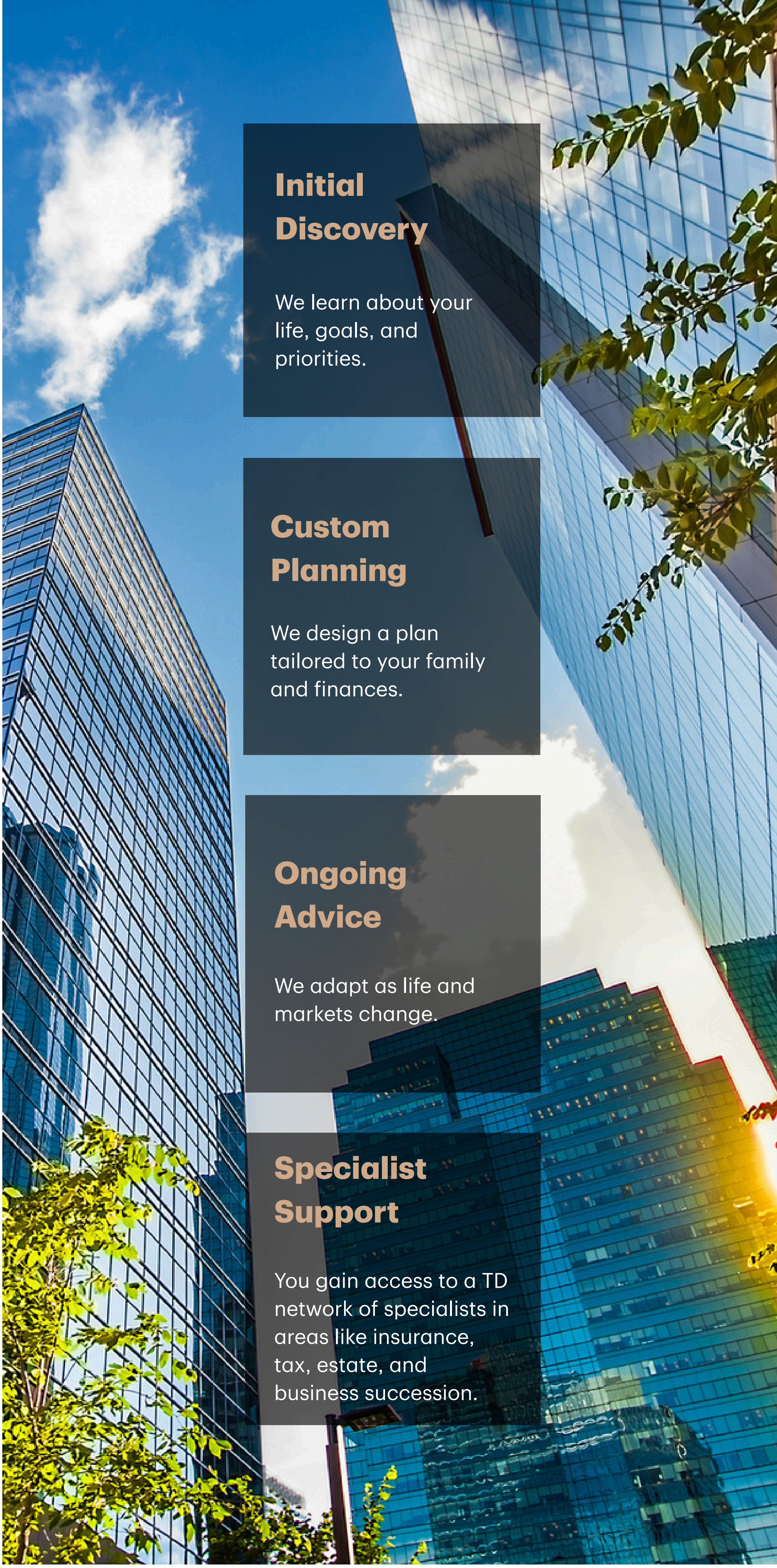
Disciplined Approach

Our disciplined approach to wealth management starts with a unique deep discovery process. This helps to clarify your financial situation, identifies your short, medium and long-term personal and financial goals, and uncovers what is truly important to you and your family.



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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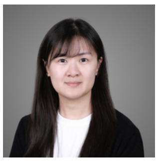

June Zhuo
Administrative Associate
Office: (780) 448-8096
Email: June.Zhuo@td.com

Iris Ng
Centralized Client Service Associate
BBA (Hons)
Office: (416) 983-6480
Email: Iris.SY.Ng@td.com

TD Specialists

Jason Uppal
Business Succession Advisor
TD Wealth

Winston Tuttle
Tax and Estate Planner
TD Wealth

Zhayate Meng
CPA
High Net Worth Planner
TD Wealth

Sharene Gaitor
Manager
TD Wealth Private Trust

Jennifer Tran
Private Banker
TD Wealth Private Banking

Monica LeBlanc
Senior Private Banker
TD Wealth Private Banking

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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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