

Trillium Wealth Management

TD Wealth Private Investment Advice
360 Albert Street, Suite 1100
Ottawa, Ontario K1R 7X7
Toll free: +1 800-347-8257
www.trilliumwealthmanagement.ca



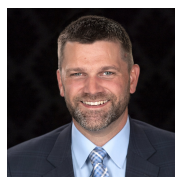
Personalized wealth management designed to help meet your goals



Geri Moss-Norbury, MA, CFP®, CIM®
Associate Portfolio Manager and Senior Investment Advisor
Tel: 613-783-5119
geri.moss-norbury@td.com

Geri has provided comprehensive wealth management advice and solutions to her clients since 1999. An Associate Portfolio Manager and Senior Investment Advisor, Geri helps build and protect financial futures and legacies, through a robust discovery process and commitment to service and understanding.

Geri holds the Certified Financial Planner designation (CFP®) and a Chartered Investment Manager (CIM®) and a masters of Arts in Legal Studies, as well as a BA Hons from Carleton University. Married with three children, some of Geri's volunteer work has included chairing a not-for-profit, chairing school council/participating in a boundary review for the school board, and convening for a local hockey association. She is an active kayaker and hiker and during her off-hours in the city she is usually at the rink, the dance studio, or the dojo.

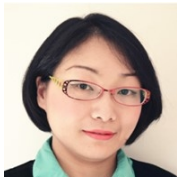


Jayme Querry, CFP®, CIM®
Portfolio Manager and Senior Investment Advisor
Tel: 613-783-1993
jayme.querry@td.com

Providing comprehensive wealth management advice and solutions to clients since 2004, Jayme is committed to providing tailor-made service and customized, personalized wealth and retirement plans. A Portfolio Manager & Senior Investment Advisor, his practice is built on trust, communication and a detailed understanding of client needs.

Prior to joining TD, Jayme was an active member of the Canadian Armed Forces with over 20 years of full and part time service as a Combat Engineer. He previously volunteered his time as a member of the Algonquin College Financial Services Advisory Committee. Outside of the office he can be found with his three boys, fishing or at the cottage. He enjoys various other outdoor activities, such as Scuba Diving, bee keeping and operating his hobby sugar shack.





Fei Yan , CFP®

Senior Investment Advisor
Tel: 613-737-1339
Fei.Yan@td.com

Fei has been working in the financial and wealth advisory industry since 2006. As Senior Investment Advisor, Fei provides comprehensive and customized wealth management advice to her clients. Based on clients' true financial needs and goals, she focuses on building a personal wealth plan for her clients through a disciplined investment approach, tax efficient strategy and effective personal financial analysis.

Fei holds the Certificated Financial Planner designation (CFP®) and a Bachelor of Commerce (B. Comm) Hons major in Finance from John Molson School of Business at Concordia University. In the past, Fei volunteered in the Ottawa Chinese Community. In her spare time, Fei enjoys yoga and home gardening.

Fei looks forward to working with you to help you achieve your personal financial long-term goals.



Oi Yi Chum

Investment Advisor
Tel: 613-728-4665
oiyi.chum@td.com

Oi Yi has provided comprehensive wealth management advice and solutions to clients since 2007. Through building investment plans for clients, to help them meet their financial goals including retirement/estate planning strategies, education planning and tax strategies.

Oi Yi hold a B. Comm degree from Carleton University and holds the Personal Financial Planner designation. Happily married with 2 kids, she enjoys traveling with her family, cooking, playing badminton and hiking.

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