Mapping your financial journey

Knowing what you need starts with knowing who you are.

And knowing who you are starts with listening.

We have developed a six-step process designed to ensure we create an overall financial strategy that aligns with your vision of success, evolves to meet your changing needs, and is implemented in an efficient and timely manner.

Step 1

Understand

We take the time to understand your financial goals and objectives, risk tolerances, estate plans, family dynamics, and anything else that is relevant to your unique situation.

Step 2

Plan

We confirm our understanding of your needs by completing, and reviewing with you, an Investment Policy Statement that outlines your investment parameters and applicable asset allocation.

Step 3

Strategize

We customize investment solutions that address your specific financial and lifestyle needs, are in alignment with your particular risk profile, and are consistent with your desired level of involvement.

Step 4

Communicate

We present our solutions to you in a clear and meaningful manner, and will take whatever time is necessary to ensure you are comfortable with our proposed solutions before proceeding.

Step 5

Implement

We execute agreed-upon solutions, liaising with TD Specialists as needed and communicating with any external professionals on your behalf.

Step 6

Monitor

We manage and review your portfolio on an ongoing basis to ensure that our strategy continues to meet your evolving needs and adapts to a changing world.

The Toronto-Dominion Bank and its subsidiaries are collectively known as TD Bank Group (TD). TD offers a full range of financial products and services to approximately 24 million customers worldwide through three key business lines: Canadian Retail, U.S. Retail and Wholesale Banking. We are part of TD Wealth Private Investment Advice under the TD Wealth (Canada); Canadian Retail.

Over the past 155+ years, TD had helped generations of our clients with their personal, family and business assets in the ways that matter to them. We've done this by building strong, transparent relationships and creating integrated, tailored solutions to help them reach their financial goals. We have operations in 13 countries in North America, Europe and Asia Pacific. In North America, our banks based in Canada and the U.S. serve customers through nearly 2,500 branches and stores conveniently located across Canada, and from Maine to Florida.

We look forward to discovering what truly matters to you.