

Charles Edgar Martin - CFA®

Senior Portfolio Manager

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A graduate of Concordia University with a degree in finance in 1993, Charles began a career in wealth management, driven by a clear ambition: to deliver a disciplined and sustainable investment approach. He holds the prestigious Chartered Financial Analyst (CFA®) designation, a hallmark of excellence in the financial industry. In 2009, he joined TD Wealth, Private Investment Advice, further enhancing the reach and sophistication of his offering. As Chair of the Investment Committee, he oversees the analysis and selection of securities included in model portfolios, ensuring rigorous discipline and strategic consistency in every decision.

His leadership, vision, and keen market insight enable him to build trusted relationships and guide clients through economic cycles. Today, Charles leverages several decades of experience to design investment strategies tailored to his clients' objectives. Deeply committed to planning, he believes every client should benefit from a structured and personalized vision, and he actively supports them in achieving their tax, estate, and wealth goals.

Outside of his professional life, Charles is an avid hockey player and a passionate follower of the Montreal Canadiens. He also enjoys relaxing at his cottage with his wife, Elisabeth, and their three children, Thomas, Juliette, and James, where he especially appreciates time around the barbecue.

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