TD Wealth

Your pathway to a clear financial future

Clearview
Family Wealth

Your interests first

At **Clearview Family Wealth**, we work with your best interests as our guide.

We bring our deep industry knowledge, extensive expertise and creative solutions to the table to help ensure that you are on the right track to meet your goals with confidence.

> “ Our pursuit of excellence is at the heart of everything we do.

Support for all of life's stages

Build net worth

Working together, we develop innovative strategies to help grow your net worth to match your current lifestyle and needs.

Implement tax-efficient strategies

Working closely with you and your tax advisors, we'll help you 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.

Protect what matters

Whether through comprehensive risk strategies or connecting you with a TD Specialist in trusts, estates and other risk mitigation products, we've got the expertise to create a comprehensive plan that's right for you.

Leave a legacy

We will 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.

Your financial ecosystem

❝ You are more than your portfolio.

*Some services may be provided in collaboration with TD Specialists.

We take care of the details

We work closely with you to help ensure you are on the right track with your investment portfolio, as well as your wealth, tax, business and estate planning.

Wealth planning

- Disciplined and ongoing discovery
- Formalized goals
- Scenario expectations
- Personalized recommendations
- Clear actionable items
- Guidance in overlooked areas
- Life insurance advice
- Estate preparation and planning
- Wealth transition advice
- Trusts, philanthropy
- Business succession planning
- Private credit advice

Tax strategies

- Identify tax-efficient investments
- Provide comprehensive tax reports to you and your tax preparer during tax season
- Create strategies to help reduce taxes during the pre-retirement and retirement stages
- Develop strategies that focus on current tax laws while considering proposed changes and how they may impact your financial situation
- Tactically reposition investments to take advantage of tax-law provisions in order to reduce taxes
- Provide access to investment solutions with preferential tax treatment
- Collaborate with your other professionals to align strategies

Administration

- Full end-to-end white-glove service including personalized onboarding, transfers and online tutorials from a dedicated team member
- Quarterly portfolio and market updates
- Easy and secure digital access via WebBroker
- Personalized and dedicated support from an experienced client-focused team

Clear, honest answers to all your questions.

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How does your Portfolio Management team get paid?

One simple, transparent, easy-to-understand fee that puts us on the same side of the table.

A fee-based approach means our interests are aligned with yours every step of the way.

Discretionary for a reason

Genuine stewardship of your wealth means managing not only your money, but your overall financial health and well-being. As discretionary portfolio managers, we have a duty to act in your best interests. We firmly establish your goals, objectives and risk tolerance so that you can delegate day-to-day investment management to us. This frees up your time for the things that are important to you.

With your goals and objectives at the centre of our discussions, we take the time to answer your questions and talk openly about our methods, our philosophy and anything else that is important to you.

Meet the team

Matthew Rodier, CIM®, FCSI®
Senior Portfolio Manager

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Matthew has over 20 years' experience at TD, including 15 years at TD Wealth. In 2017, he was named the sole recipient of the IIAC Top Under 40 Award, which recognizes and celebrates Canada's new generation of highly motivated and talented young professionals whose drive, dedication, qualities and accomplishments have brought distinction to the investment and financial industry.*

As an award-winning Senior Portfolio Manager, Matthew leads the Clearview Family Wealth team in an effort to provide industry-leading financial solutions to their clients.

Matthew's commitment to the community extends by his participation and support for the "Just For Kids Foundation", as well as several other worthy charitable causes.

Matthew is a husband and father of three, a loyal Montreal Canadiens fan, and a self-proclaimed foodie.

Michael I. Levine, CIM®
Senior Portfolio Manager

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Michael has over 35 years of business experience, including over 25 years in the financial industry. Prior to joining TD Wealth in 2006, he was Vice President and Investment Advisor with another Canadian Chartered Bank.

As a Senior Portfolio Manager, Michael co-leads the Clearview Family Wealth team with a focus on clarity and a commitment to excellence.

Michael leverages his experience working with high-net-worth clients in complex scenarios to build strategies that help clients achieve their financial goals.

With the support of a dedicated and knowledgeable team, Michael works closely with clients to truly understand their unique circumstances and develop customized strategies that put their interests first.

*Winner of the 2017 Investment Industry Association of Canada Top Under 40 Award. https://iiac.ca/iiac-top-under-40-award

Get in touch

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