

As a client of TD Wealth Private Investment Advice, we will strive to provide you with excellent service and sound wealth management advice tailored to your needs.

As part of our commitment to you, we take pride in working to deliver an exceptional client experience. Behind the scenes other TD specialists work on your behalf to provide leading-edge economic analysis, regional expertise, and astute risk management.

As your trusted wealth advisory team, our goal is to provide you with value-added services based on a deep understanding of your needs and goals, and to continually invest in our relationship.



Doug Martin, CFP®, B.Comm. (Hons)
Investment Advisor
TD Wealth Private Investment Advice
25 Watline Avenue, 6th Floor
Mississauga, Ontario L4Z 2Z1
905-501-7480
1-877-414-1727
doug.martin@td.com
www.martinwealthmanagement.ca



Gillian Martin, B.Comm. (Hons)
Client Service Associate
TD Wealth Private Investment Advice
25 Watline Avenue, 6th Floor
Mississauga, Ontario L4Z 2Z1
905-501-7670
1-877-414-1727
gillian.martin@td.com
www.martinwealthmanagement.ca



Martin Wealth Management consists of Doug Martin, Investment Advisor and Gillian Martin, Client Service Associate. Martin Wealth Management is part of TD Wealth Private Investment Advice, a division of TD Waterhouse Canada Inc. TD Waterhouse Canada Inc. is a subsidiary of The Toronto-Dominion Bank. TD Waterhouse Canada Inc. – Member of the Canadian Investor Protection Fund. All trademarks are the property of their respective owners. © The TD logo and other trade-marks are the property of The Toronto-Dominion Bank.

TD Wealth

Our commitment to you



Martin

Wealth Management



How We Help Our Clients

At Martin Wealth Management, we leverage our knowledge, skills and experience to provide personal service and customized wealth management advice. Our ultimate goal is to *eliminate our clients' need to worry...* after all, worrying is what they are hiring us to do.

Leadership

- Work with clients to become crystal clear about values, goals and current market realities
- Initiate discussions about topics that are often tough to talk about

Act as an Objective Third Party

- Take on the role of an "emotional anchor"
- Provide reason during periods of volatility, urging clients to stick to the plan that we've carefully developed together

Focus on the Entire Wealth Picture

- Welcome client queries on multiple topics (not just investments!), so that clients don't have to use multiple advisor-figures to deal with bits and pieces of larger-scale concerns

- Work with other TD specialists and a network of external specialists (estate planners, insurance advisors, accountants, tax advisors) built through over forty years of experience in the industry to discover opportunities in more depth

Immersion in the Industry

- Consolidate massive amounts of financial information (ex. macroeconomic reports; individual equity analysis reports published by Credit Suisse and Standard and Poor's; external publications like Investment Executive, Forum and Advisors Edge; opinions of world-renowned industry experts obtained through attendance at conferences; minimum 30 hours per year of continuing education material) to develop conclusions and recommendations
- Give to clients the *gift of time*, as they don't often have the time or the inclination to consolidate this degree of research themselves

What Sets Us Apart

Individualized Reporting and Meetings

- *Make the time and take the time* to have in-depth, meaningful, *face-to-face* meetings with clients regarding detailed, *handwritten* portfolio reviews

High Level of Client Service

- Ensure the same, familiar person is available to answer your daily telephone calls and emails
- Address your concerns more comprehensively due to our intimate knowledge of your personal lives and your accounts
- Liaise with your lawyers and tax preparers at your request to ensure that they obtain documentation that they need in a timely fashion
- Assist you in fostering your children's financial literacy and in making them a part of your financial plan, if you so desire

Flexibility

- Construct portfolios to allow clients to access *all* of their money at *any* time

Relevant Credentials

- Both Doug and Gillian graduated with their Bachelor of Commerce (Hons) from Queen's University
- Doug is a Certified Financial Planner (CFP®) and holds his Level II Life and Disability Insurance License
- Committed to the continuous upgrading of knowledge, both Doug and Gillian complete regular continuing education credits and Gillian is currently pursuing a MBA with Complete CFA® Integration