

## Private Investment Advice

### A one-on-one approach – and more

Our relationship with you is the key to offering you tailored wealth strategies. The insight we gain from our conversation is the basis on which we design your investment and wealth plan. By building a long-lasting relationship based on trust, we can better help you plan for the long term and manage your wealth successfully for generations to come.



**Douglas Orford** BBA, CIM®  
Investment Advisor  
TD Wealth Private Investment Advice  
506-646-1136  
doug.orford@td.com

The cornerstone of my business is a one-on-one relationship with each client, based on trust, communication and a detailed understanding of their needs. By working with other TD Specialists, I help address the full scope of investment, wealth and retirement needs, including wealth protection and insurance solutions, estate planning and trust services, and charitable giving strategies.

### Introducing additional TD specialists

Your customized plan is as individual as your needs, and will change over time. When you need other specialists to help you reach your goals, we have the solution. Our trusted TD specialists are here to provide the same attentive service you've come to expect from your investment team. With your permission, we will engage a TD specialist to address your specific needs. Rest assured that we will remain your primary point of contact at all times. When appropriate, we can also work alongside your other professional advisors to help ensure your wealth plan incorporates all aspects of your personal and professional life.

**Suzanne Coggins** CPA, CA  
High Net Worth Planner

Your High Net Worth Planner will work with you and other professional advisors, when appropriate, to develop comprehensive wealth strategies based on a number of wealth considerations. Among them: creating retirement income streams, incorporating business considerations into your estate plan, transitioning your business, accessing sophisticated credit solutions, and creating thoughtful strategies around taxes and giving.

**Laura Lee Burke**  
Private Banker

A Private Banker from TD Wealth Private Banking will gain a strong understanding of your financial needs and goals to create a personal strategy for you and your family based on our Life Discovery Process. Your personal strategy may include a range of sophisticated banking and credit solutions that will work together to help make your everyday banking simplified and seamless. As your needs change, so should your strategy.

**Keleena Mariasine** B.Comm, MTI  
Private Trust Specialists

TD Wealth Private Trust offers high net worth estate planning, estate and trust administration, taxation and investment strategies focused on identifying solutions that reflect your unique situation, today and in the future. Your Private Trust specialist can work with your Will and Estate Planner to help ensure that you have a comprehensive strategy in place to manage your estate, for you and your beneficiaries.

**Noreen MacPherson** BA, LL.B., TEP  
Tax and Estate Planner

The Tax and Estate Planner provides expertise in estate, trust and tax planning to assist you in developing an estate plan that reflects your personal choices for the future, and the legacy you will leave behind. To help manage your responsibilities, the Tax and Estate Planner can work with other TD specialists and external subject matter experts to help identify issues and properly structure your estate in a tax effective manner.

**Michael Josey**  
Tax and Estate Planner

The Tax and Estate Planner provides expertise in estate, trust and tax planning to assist you in developing an estate plan that reflects your personal choices for the future, and the legacy you will leave behind. To help manage your responsibilities, the Tax and Estate Planner can work with other TD specialists and external subject matter experts to help identify issues and properly structure your estate in a tax effective manner.

