TD Wealth

James Berry
Wealth Management

Navigating your financial journey with commitment and discipline

Helping you get off the financial rollercoaster

At James Berry Wealth Management, our goal is to be your wealth quarterback — taking care of your financial affairs so you can comfortably enjoy your life — now, and in retirement. When it comes to investing, our goal is to provide stable, consistent returns over the long term. We're focused on risk management, capital preservation, cash flow and helping you ensure that your accumulated assets will provide income throughout your retirement.

We promise to work closely with you and your family to help you achieve the financial future you envision.

Simplifying your financial life

Our comprehensive service offering goes well beyond your asset allocation strategy. We can help you sort through the financial complexities of your life, so you can achieve your goals.

Together, with a team of TD Specialists, we have the resources and capabilities to manage:

- Portfolio building and investment strategies
- Tax strategies
- Insurance coverage
- Education savings plans
- Estate and legacy planning
- Business succession support
- Philanthropic efforts & charitable giving (trusts)
- Cash flow management
- Estate and legacy planning
- Customized retirement income strategies
- Custom credit options
- Private banking needs
- Wealth transfer strategies

Helping you achieve your vision

Building net worth

We know how important it is to build your wealth so you can enjoy life's priorities and achieve your vision for the future.

Protecting what matters

Life is filled with uncertainty and that's why we're committed to delivering solutions to help protect the things you value.

Leaving a legacy

You are the architect of your legacy and we can help you with the blueprint.

Implementing tax-efficient strategies

You've worked hard to accumulate your wealth and we want to help you make the most of it.

As your advisory team, we handle your investments and your overall wealth strategy. As your lead relationship manager, we offer tailored wealth plans and connect you with the TD Specialists who can help you in areas such as estate planning, insurance, philanthropic giving and business succession planning.

Our holistic support model goes well beyond the portfolio. Our experienced team is also comfortable working with your other trusted professionals, such as lawyers or accountants. We view wealth management as an evolving relationship based on integrity, communication and shared purpose.

It's all about you

Our wealth management process is based on many years of experience building relationships with affluent clients with wide-ranging backgrounds and circumstances. One thing is consistent: You. You are at the core of everything we do.

Our clients are business owners, executives, professionals (lawyers, doctors, accountants, engineers), and retirees. We service individuals, families and extended families. We work with the grown children of our clients — helping them through the growing pains of early adulthood.

Our client experiences run far and wide, giving us the skills and experience to handle any scenario with confidence and expertise.

Helping you sort through the complexity of your professional life, owning your own business and managing your family's future — allowing you to make better decisions.

What to expect

Getting to know you

During our initial meetings, we'll have a lot of conversations. We'll also review your current portfolio, your statements and other documentation, but ideally, we'll talk. To understand your complete financial picture, we'll get to know your family situation, current lifestyle, retirement goals, estate-planning wishes, risk tolerance, income needs and, most importantly, your values. This is a hugely important part of the wealth planning process, helping us clarify your goals and our approach for achieving them.

Building your customized strategy

After we get to know you, we create a long-term wealth plan that includes a strategic, goals-based investment strategy. Your wealth plan is yours, and yours alone. It is customized to meet your needs, and will evolve as you do.

Reviewing & monitoring

We understand that life can be complicated and things change along the way. To ensure your wealth plan and asset allocation remain appropriate, we analyze, monitor and adjust, as needed, on an ongoing basis. For us, the "get to know you" phase runs throughout our relationship.

Keep in touch

Your finances are your future. We recognize and appreciate the weight of our role, and want you to feel at ease with the work we do. We have an open-door policy and are here to answer your questions.
Our philosophy is based on honest communication and accountability. You can expect regular communication from us.

A disciplined approach to helping you grow, protect and transfer your wealth

In retirement, income is vital. This is why we are focused on capital preservation and cash flow generation.

We recognize that you've worked hard to accumulate your wealth. It's our job to make it work for you in retirement. This is why capital preservation is at the forefront of our investment approach. We construct a portfolio tailored to you, striving to achieve regular, stable distributions. When executed within your portfolio, this includes:

- High-quality dividend paying stocks from companies with a history of responsibly growing their dividend over time
- Fixed-income securities appropriate for your needs
- Reputable mutual funds and exchange-traded funds incorporated into your portfolio, where applicable
- Alternative investments with a lower correlation to traditional asset classes that can provide diversification benefits
- Strategic allocation of equities, fixed-income and cash or cash equivalents customized for your unique goals, risk tolerance and income needs

Our investment discipline is driven by your retirement income needs. We are focused on cash flow because we recognize that when you retire, income will be your central need.

Risk management vs. asset allocation

Managing risk goes beyond asset allocation models. Our risk management framework combines our focus on capital preservation and cash flow with your short- and long-term goals.

We take a systematic approach to risk management, one that carefully considers your approach to your personal finances. We strive to recognize not only potential market risks, but also those that stem from beliefs, personality and individual circumstances. From there, we use a methodical, research-based approach to risk mitigation.

Experience, commitment, focus

Investment Team

James Berry, CIM®

Vice President, Investment Advisor

T: 416 983 6670 | james.berry@td.com

James has been providing clients with wealth management solutions tailored to their needs for more than twenty years. He holds the Chartered Investment Manager (CIM®) designation and is a Certified Retirement Specialist.

James works closely with individuals, families, business owners and retirees to help grow and protect their wealth and provide for their loved ones. Dedicated to building long-term advisory relationships, James is focused on understanding each client's personal situation and goals. He combines his education and years of experience to create wealth planning strategies to meet client needs.

James lives in Toronto with his wife and three children. He volunteers his time to the community through his commitment to various local charities focused on wellness and children's health.

Victor von der Borch, CFA®, CIM®

Associate Investment Advisor

T: 416 983 3729 | victor.vonderborch@td.com

Victor began his career at TD Wealth in 2012. Committed to ongoing professional development, he holds both the Chartered Financial Analyst® and Chartered Investment Manager (CIM®) designations.

Victor works closely with James Berry, supporting the research, wealth planning and portfolio management needs of clients.

Galit Nir

Client Service Associate

T: 416 307 9264 | galit.nir@td.com

Galit has been working with high-net-worth clients at TD Wealth for more than four years.

Dedicated to providing an exceptional client service experience, she supports the team's day-to-day activities, ensures all client requests are handled both accurately and efficiently.

We believe in a holistic wealth management model. Building a long-term relationship with you and your family allows us to know and understand your needs as they evolve over time.

When you work with James Berry Wealth Management, you can expect dedication, focus and commitment to the highest level of personal care and discretion. We're here to help you achieve your goals — one day at a time.

TD Specialists

Paul Badham
Estate Planning Advisor
Wealth Advisory Services

Domenic Tagliola
Tax & Estate Planner
Wealth Advisory Services

Dale Durand
Business Succession Advisor
Wealth Advisory Services

Jonathan Clare
High Net Worth Planner
Wealth Advisory Services

Let's talk

We're proud of our offering and would love to meet you to discuss whether our approach will work for your needs.

If you have questions about your current portfolio or are interested in getting together to discuss working together, give us a call and we'll set up a meeting.

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Over the past 155+ years, TD has helped generations of clients with their personal, family and business assets in the ways that matter to them. TD has done this by building strong, transparent relationships and creating integrated, tailored solutions to help people reach their financial goals.