TD Wealth

TD Wealth Private Investment Advice

Personalized wealth management designed for you

LOBE GESTION DE PATRIMOINE
WEALTH MANAGEMENT

What we offer

To help you meet your goals, we take a comprehensive approach that extends beyond investing. We offer you the relevant, customized wealth advice you deserve – and we can do that only by fully understanding you.

As your needs change and evolve over time, we will tailor our services and solutions strategies accordingly. Whether you are building your career or business, or shifting into retirement, we believe that our disciplined planning approach will help make you more confident in your decisions, and more focused on your future.

Our client-centred approach

Our relationship with you is the key to offering you tailored wealth strategies. The insight we gain from working with you is the basis on which we design your unique strategy that fits your goals. We understand what makes your situation different. We actively listen and gather in-depth information to establish a clear understanding of your goals.

We believe that your personal wealth strategy is key to your financial success. However, before we can begin to build your plan, we take the time to develop a deep understanding of you.

Understanding you

We start with a deep understanding of who you are, your values and your vision of success. This means reviewing the financial decisions you've made over the years, the goals you've set for yourself in the years to come, and the ways in which these reflect what is important in your life. To create your personal investment and wealth plan, we leverage our broad expertise to fit your unique needs.

A disciplined approach to investment management

Investment management is one of our key strengths and the cornerstone of every wealth strategy. Our investment philosophy is rigorous, disciplined and comprehensive, with a balanced approach to wealth preservation and growth.

We also draw on the expertise of a variety of TD investment professionals and risk management specialists. They provide our team with economic and market research that helps us not only manage your portfolio, but also identify the opportunities that lie in market shifts.

Getting the appropriate investment advice is a key part of managing wealth. But it's just one part of a bigger picture. You may also need to manage ongoing finances, minimize taxes or structure your estate in a tax-efficient manner.

Integrated wealth services

We take an integrated approach, bringing in other TD specialists as required to develop a custom wealth strategy. We assemble as a team in developing the solutions you require, such as:

- A retirement plan
- Tax mitigation strategies
- Business succession advice
- Private banking solutions
- Estate and trust services
- Customized credit
- Asset protection strategies
- Philanthropic planning

Helping you achieve your vision of success

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. Working together we can develop innovative strategies to help grow your net worth by identifying which credit strategies and investment solutions match your current lifestyle and needs. Our team of professionals can work with you to develop an effective plan to help you make your vision a reality.

Implementing tax-efficient strategies

You've worked hard to accumulate your wealth and we want to help you to make the most of it. Working closely with you and your tax advisors, we'll 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.

Protecting what matters

Life is filled with uncertainty and that's why we're committed to delivering advice and solutions to help protect the things you value at every life stage. Whether through comprehensive risk strategies or connecting you with a specialist in trusts, estates and other risk mitigation products, we've got the expertise to create a comprehensive plan that's right for you.

Leaving a legacy

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

Meet our team

Jason Lobe
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Additional TD Specialists

Annie Boivin
Business Succession Advisor
Wealth Advisory Services

Annie Belanger
Estate Planning Advisor
Wealth Advisory Services

Nicole Assee
High Net Worth Planner
Wealth Advisory Services

Teresa Malowany
High Net Worth Planner
Wealth Advisory Services

Francois Desmarais
Tax & Estate Planner
Wealth Advisory Services

We're ready to begin the journey of helping you manage, preserve and transition your wealth. Shall we begin? Please contact us for more information or to arrange a complimentary consultation.

We look forward to learning more about what matters most to you.

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