



TD Wealth

A sounding board for the people who **matter** most

Many of the clients we serve today were first introduced to us by someone who understood both their circumstances and the way we work.

If someone you know is facing an important financial decision, or would benefit from a thoughtful second perspective, we would be pleased to have an initial conversation with them.

It begins with listening: understanding where they are today, what matters most to them and what they hope to accomplish. From there, we can determine together whether our experience and approach would be a good fit.

Who we typically work with

- Families managing established or growing wealth
- Business owners preparing for a sale or succession
- Professionals with complex income and planning considerations
- Farmers and agribusiness families navigating transition
- Individuals and families approaching or living in retirement

If someone comes to mind, we invite you to make a personal introduction and share any context you believe would be helpful. We will take it from there with discretion, care and respect for the trust you have placed in us.

When you introduce someone to us, you are entrusting us with more than a financial conversation. We never take that trust for granted.



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