TD Wealth Private Investment Advice

Committed to understanding your needs and helping you achieve your vision of success

Mackie Sidhu
Wealth Management

What we offer

We work with individuals, families and organizations with considerable investable assets and wide-ranging, often complex financial needs. As our clients' needs change and evolve over time, so do the services and solutions we offer.

Managing considerable wealth can be complicated. We will utilize a distinct Discovery Process to help get to the heart of what matters-the hopes, dreams and goals of you and your family-to shape to help build your personal wealth strategy and help you achieve your personal vision of success. Once your strategy has taken shape, we will likely build a handpicked advisory team of TD specialists to help put your plan into action and monitor its success.

Whether you're building your business, shifting into retirement or planning your legacy, we'll work with you throughout your journey.

We look forward to working with you and your family.

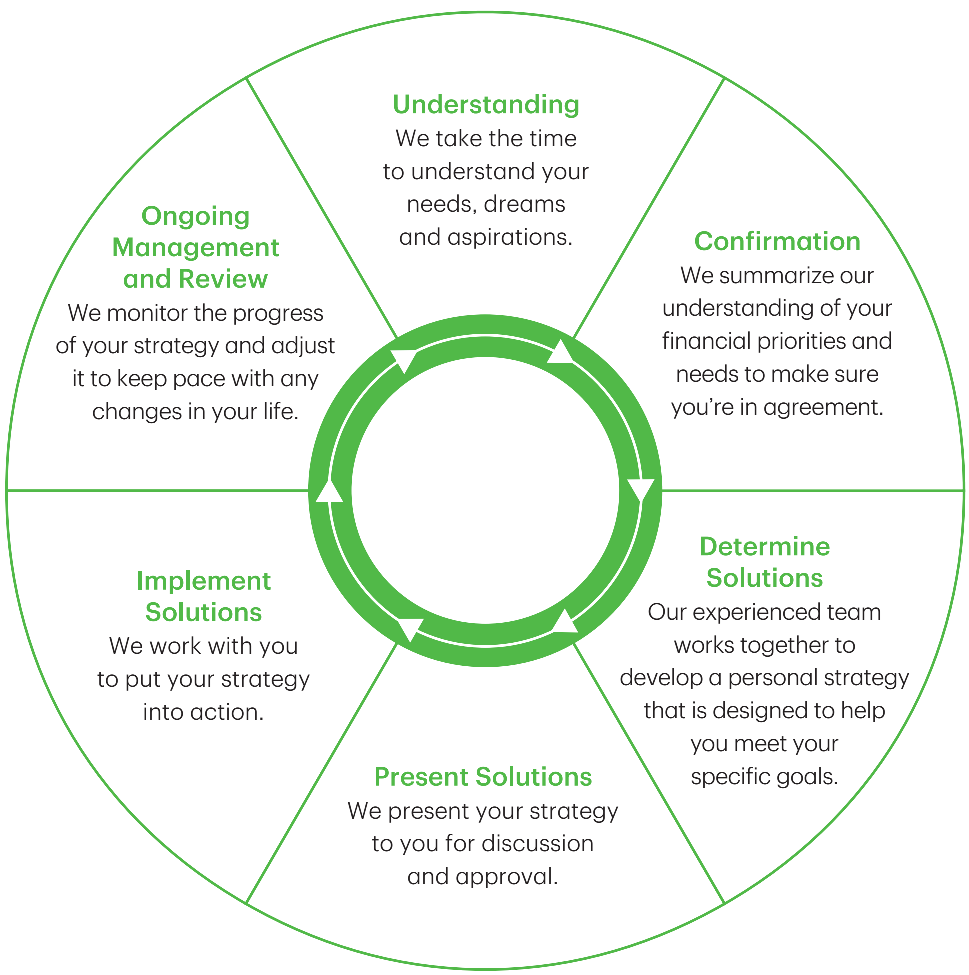
Our client-centred approach

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 manne .

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 st ategies

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

Our team has been working with affluent clients and their amilies for many years. Complementing that wisdom is our commitment to ongoing industry training, with many of our team members having achieved multiple industry certifications.

James Mackie, CFP®
Vice President, Investment Advisor
Tel: 604-654-4712 | james.mackie@td.com

I joined TD Wealth Private Investment Advice in 1999 and I have over 30 years of financial service industry experience. I hold the Certified Financial Planner (CFP®) designation and am currently a Vice President, Investment Advisor.

I attended the University of British Columbia where I majored in History.

When I work with you my goals are for us to build a long-term relationship and to create a personalized financial plan to help maximize your potential gains. I grew up in Vancouver and now live in Delta with my wife Wendy and daughter Emma. I am actively involved in the local soccer community and volunteer with youth sports and the Greater Vancouver Food Bank Society.

Jessie Sidhu, CIM®
Vice President, Investment Advisor, Portfolio Manager
Tel: 604-482-2484 | jessie.sidhu@td.com

I have been with TD Wealth Private Investment Advice since 2004, and I have over 20 years of experience in the financial services industry. My breadth of experience includes various senior management roles at the branch and regional level. I believe that investment advice is just one component of the overall wealth management relationship with you. I take a disciplined approach to understanding your needs and objectives. My goal is to build a relationship with you based on trust, accountability, and transparency.

My wife Karla, daughter Sylvia and I enjoy living in downtown Vancouver and all the city has to offer. Away from the business, I enjoy biking, live music and spending time with family and friends. I also like to find unique ways to contribute to my community. Some recent projects I have worked on have been fund raising for the Greater Vancouver Food Bank Society and volunteering in the Downtown Eastside serving meals to those in need.

Karla Rand
Client Service Associate

Tel: 604-482-2480 | karla.rand@td.com

I have been with TD Wealth Private Investment Advice since 2013 and I have over 36 years of experience in the financial industry. My experience includes various operational and support roles including Branch Administrator and Client Service Associate. I enjoy my role on the team as lead on all issues of an administrative nature.

I attended BCIT and Kwantlen College with a focus on Accounting.

I was born in Vancouver and currently reside in Richmond with my husband, Richard. Richard and I enjoy volunteering in our local community. I also enjoy golfing, bike riding, travelling and spending time with family and friends.

Bryanne Shields
Assistant Investment Advisor

Tel: 604-482-8344 | bryanne.shields@td.com

I have been with TD Wealth Private Investment Advice since June 2016. I began my career at TD Canada Trust where I worked as a Customer Service Representative. My role as a Customer Service Representative allowed me to exercise my passion for excellence in customer service. As I progressed in this role I developed an interest in the wealth management industry which led me to pursue a career at TD Wealth.

I attended Capilano University in North Vancouver where I obtained an Associate of Arts degree with a focus in Psychology and English.

I grew up in North Vancouver and still reside there with my dog, Kujo. In my spare time I enjoy yoga, hiking, cooking and volunteering in my community.

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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