



TD Wealth

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 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

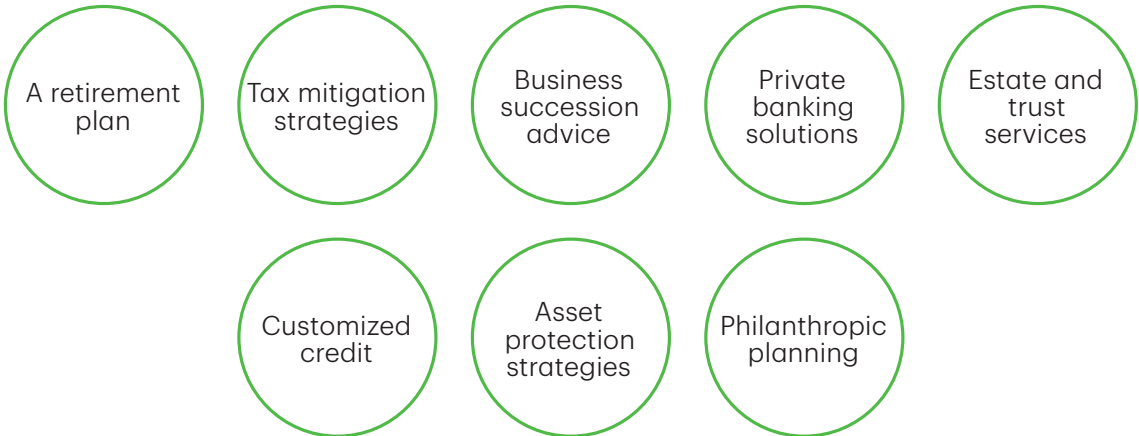
Investment management is one of our key strengths and the cornerstone of every wealth strategy. Our investment philosophy is rigorous, disciplined and comprehensive, with a balanced approach to wealth preservation and growth.

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 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:



# 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

Our team has been working with affluent clients and their families 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**  
Vice President, Portfolio Manager, Investment Advisor  
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 brand 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 downtown Vancouver and all the city has to offer. Away from the business, I enjoy biking, live music and spending my 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.



**Bryanne Shields**

Client Service Associate

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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.

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



**Emma Mackie**, B.Sc.

Client Service Associate

Tel: 604-482-2482 | [emma.mackie@td.com](mailto:emma.mackie@td.com)

I have been with TD Wealth Private Investment Advice since 2011. My career with TD Wealth started as an intern while I was in high school and continued through out university. I have developed a passion for the financial industry and strive for excellence when it comes to clients and their individual needs.

I attended Providence College to pursue Division 1 collegiate athletics, playing Field Hockey and graduated with a degree in Marketing & Finance.

I grew up in Delta and now currently reside in Vancouver. In my spare time I enjoy coaching youth sports, skiing and looking for the next place to travel to.

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.

### **Mackie Sidhu Wealth Management**

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