



穿越经济周期

助力您实现愿景中的成功

Jun Yan

Portfolio Manager

Senior Investment Advisor

Tel: 604-482-5166 Cell: 604-790-1828

Email: jun.yan@td.com

TD Wealth Private Investment Advice
5811 Cooney Road Suite 306,
Richmond, BC, V6X 3M1

TD Wealth |





Jun Yan

CIM®, FCSI®, M. Econ

高级组合投资经理 Portfolio Manager

资深投资顾问 Senior Investment Advisor

简介：

Jun 祖籍山东，出生于湖北武汉，中南财经政法大学经济学研究生，1998 年技术移民加拿大。Jun 于 2000 进入 TD 银行系统。2007 年从 TD 加拿大信托理财顾问职位调入 TD 财富私人投资咨询部。

受益于中国以及北美两地的学习，工作和生活体验，Jun 以独特的视角观察经济。在如今错综复杂的投资环境中帮助客户读懂大势，把握机遇。

作为一名高级组合投资经理和资深投资顾问，Jun 和他的团队在深入了解客户核心需求的基础上，用心打造高品质的理财方案，帮助客户实现家庭财富的增长和传承。

我们的使命

化繁为简，提供高品质的理财解决方案

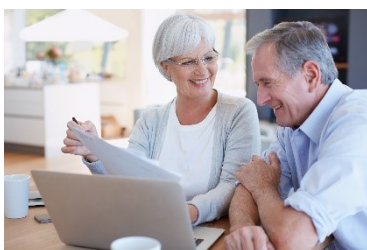


携手 TD 专家团队为您提供以下服务：

您	投资组合管理	投资咨询	私人银行	遗产和信托服务
财富顾问服务	自管投资	小型商业理财服务	商业银行	资本市场服务

我们的价值

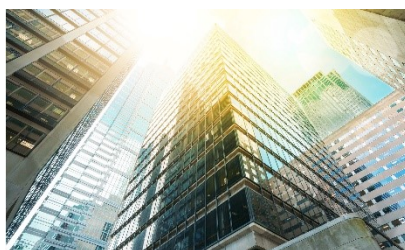
同心协力，助力实现您的核心理财目标



家庭

家庭是大自然的杰作之一。

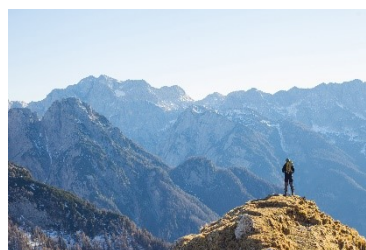
- 乔治·桑塔亚那



工作与事业

知之者不如好之者，好之者不如乐之者。

- 孔子 《论语》



安康

健康是最大的财富。

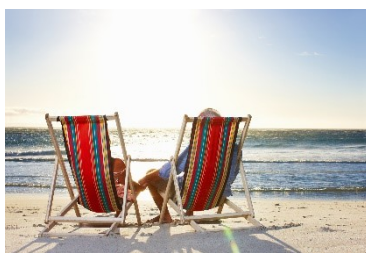
- 维吉尔



家

家不仅是生活的地方，它还是理解与包容的港湾。

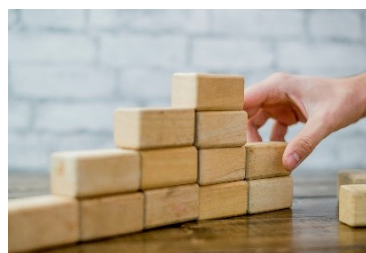
- 克里斯汀·摩根施特恩



生活方式

掌握我们命运的不是星星，而是我们自己。

- 莎士比亚



传承

未来取决于我们现在的努力与规划。

- 莫罕达斯·甘地

全委托投资管理

- 投资模型基于我们认知范围内行业顶尖基金智慧
- 资产配置随经济周期动态调整
- 系统地规避客户情绪对投资决策的冲击

我们相信

- 财富管理是家庭“基础设施”的组成部分
- “人”是最重要的财富
- “财富旅程”始于规划
- 投资随周期而动
- 价值投资

欢迎新客户致电垂询

Jun Yan CIM® FCSI® M.Econ

Portfolio Manager
Senior Investment Advisor
TD Wealth Private Investment Advice
T: 604 482 5166
C: 604 790 1828
E: jun.yan@td.com

Renee Li

Client Service Associate
TD Wealth Private
Investment Advice
T: 604 482 5129
E: renee.x.li@td.com

Candice Zhou

Administrative Associate
TD Wealth Private
Investment Advice
T: 604 482 5129
E: candice.zhou@td.com

[Website: advisors.td.com/jun.yan/](http://advisors.td.com/jun.yan/)

Disclosures

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