穿越经济周期

助力您实现愿景中的成功

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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

传承
您的脚印

守护
您的所有

增值
您的资产

分配
税务优化

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

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Disclosures

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