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

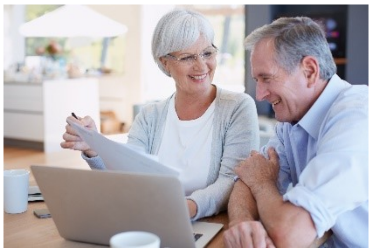
分配
税务优化

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

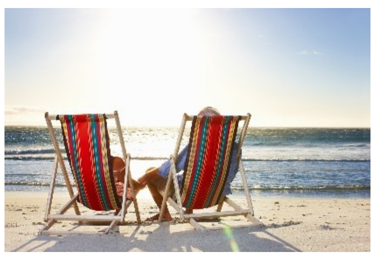


家庭
家庭是大自然的杰作之一。
– 乔治. 桑塔亚那

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

The information contained herein has been provided by Jun Yan, Portfolio Manager, Senior Investment Advisor at TD Wealth Private Investment Advice and is for information purposes only. The information has been drawn from sources believed to be reliable. Graphs and charts are used for illustrative purposes only and do not reflect future values or future performance of any investment. The information does not provide financial, legal, tax or investment advice. Particular investment, tax, or trading strategies should be evaluated relative to each individual's objectives and risk tolerance.

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