TD Wealth

Private Investment Advice
A one-on-one approach – and more

Our relationship with you is the key to offering you tailored wealth strategies. The insight we gain from our conversation is the basis on which we design your investment and wealth plan. By building a long-lasting relationship based on trust, we can better help you plan for the long term and manage your wealth successfully for generations to come.

Kriss W. Bush CIM®, FCSI®, CIWM, CPA
Investment Advisor
TD Wealth Private Investment Advice
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I utilize my extensive background as a CPA and former CFO with 25 years of experience as an investment and capital markets banker, tax specialist and wealth advisor with Price Waterhouse, American Express Private Banking, RBC Dominion Securities and TD Wealth to create wealth plans and strategies tailored to meet the needs of your family or business.

Introducing additional TD specialists

Your customized plan is as individual as your needs, and will change over time. When you need other specialists to help you reach your goals, we have the solution. Our trusted TD specialists are here to provide the same attentive service you've come to expect from your investment team. With your permission, we will engage a TD specialist to address your specific needs. Rest assured that we will remain your primary point of contact at all times. When appropriate, we can also work alongside your other professional advisors to help ensure your wealth plan incorporates all aspects of your personal and professional life.

Ilan Braude M.Sc., J.D
High Net Worth Planner

Your High Net Worth Planner will work with you and other professional advisors, when appropriate, to develop comprehensive wealth strategies based on a number of wealth considerations. Among them: creating retirement income streams, incorporating business considerations into your estate plan, transitioning your business, accessing sophisticated credit solutions, and creating thoughtfull strategies around taxes and giving.

Christopher Kostoff JD, TEP
Tax and Estate Planner

The Tax and Estate Planner provides expertise in estate, trust and tax planning to assist you in developing an estate plan that reflects your personal choices for the future, and the legacy you will leave behind. To help manage your responsibilities, the Tax and Estate Planner can work with other TD specialists and external subject matter experts to help identify issues and properly structure your estate in a tax effective manner.

James Forsyth Relationship Manager
TD Commercial Banker

Your TD Commercial Banker specializes in meeting the needs of medium- and large-sized Canadian businesses, and can customize a broad range of products and services to look after your corporate financing, investment, cash management, international trade and day-to-day banking requirements.

Robert Conboy Trust Officer
Private Trust Specialists

TD Wealth Private Trust offers high net worth estate planning, estate and trust administration, taxation and investment strategies focused on identifying solutions that reflect your unique situation, today and in the future. Your Private Trust specialist can work with your Will and Estate Planner to help ensure that you have a comprehensive strategy inplace to manage your estate, for you and your beneficiaries.

Julie Kwan
Private Banker

A Private Banker from TD Wealth Private Banking will gain a strong understanding of your financial needs and goals to create a personal strategy for you and your family based on our Life Discovery Process. Your personal strategy may include a range of sophisticated banking and credit solutions that will work together to help make your everyday banking simplified and seamless. As your needs change, so should your strategy.

Chris Delaney BA, LL.b, B.Ed., REP
Business Succession Advisor

Your experiencecd Business Succession Advisor will work with you and your team of external advisors, including lawyers, accountants and business brokers, to help maximize the value of your business and create a plan for a smooth transfer down the road.

Jo-Anne Ryan Vice President Philanthropy
Philanthropic Specialist

If you're looking for a way to plan your giving more effectively and create a lasting legacy to support the charities that matter most to you, our philanthropic services provide access to the Private Giving Foundation, the first donor-advised fund program launched by a financial institution in Canada. Our TD specialist will work one-on-one with you and your family to incorporate philanthropy into your overall estate and wealth plans, and help you create a legacy that is meaningful to you.

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