TD Wealth

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Wealth management advice based on your unique goals

As Vice President & Investment Advisor, I lead the Legacy Wealth Advisory Group at TD Wealth Private Investment Advice in Calgary. My team and I deliver a personalized comprehensive wealth plan for affluent individuals, businesses, and their families based on each household's unique situation, allowing clients to focus on other areas of their personal lives.

Working with individuals and their families for over 20 years, whether it be their children's education, business investment, retirement, estate, or tax planning strategies, my expertise has helped uncover hidden needs and identify opportunities to help maximize and preserve wealth. Working closely with accountants, lawyers, and bankers, I help ensure families receive professional advice on areas that are important to them and engaging TD specialists to provide their expertise on estate, tax, trust, philanthropy, and insurance matters to help create solutions where needed.

I've held the Certified Financial Planner (CFP®) designation for over 20 years. I joined TD Wealth Financial Planning as a Financial Planner for 8 years. In 2010, I moved into TD Wealth Private Investment Advice to become an Investment Advisor, which I still enjoy doing until today.

During my personal time, my wife and I enjoy driving down to our place in Kimberly and spending our time exploring the great outdoors. During winter, we spend most our time skiing and snowshoeing and in the summer we go kayaking, biking, and hiking.

Legacy
Wealth Advisory Group