The value of advice: TD Wealth client stories

Like you, I work with a variety of clients to help them discover and achieve what truly matters to them and help them create a financial future they can feel confident in. Our personalized approach to private wealth management is what sets us apart. In creating wealth strategies, I take on a holistic approach so our clients can feel confident about living their best life.

At TD Wealth, we help our clients in the following key areas:

- **Building net worth** – We help high-net-worth clients grow their investments using a variety of strategies, including retirement planning, investment management, banking and credit solutions, and education planning.
- **Implementing tax-efficient strategies** – We work closely with clients to explore tax-efficient strategies, including family tax planning, retirement income planning, tax-efficient investing, and setting up plans to help maximize tax savings for their beneficiaries.
- **Protecting what matters** – We work with clients to help protect what matters to them the most, including protecting their ability to earn income, maximizing wealth transfer to beneficiaries, protecting their business, and helping them prepare a Power of Attorney.
- **Leaving a legacy** – We work closely with our clients to help them develop a meaningful legacy for their family and community, including Will and Estate Planning, charitable gifting, and creating a comprehensive business succession plan.

When **Tim and Patty** were faced with a life-altering event, their TD Wealth advisor helped them through the deeply personal aspects of legacy planning. Hear—in Tim's words—how their TD Wealth advisor took the time to understand their vision and helped him establish a legacy in Patty's honour that will inspire students for years to come.

Another short client story we created is about **Steve and Lee-Ann**. For Steve and Lee-Ann, financial success seemed out of reach. They had more questions than answers. So, a TD Wealth advisor worked with them to address every question they had and helped them come up with a comprehensive retirement plan.

If you know someone who can benefit from comprehensive private wealth management, we are more than happy to assist them. Like you, our goal is to help high-net-worth clients achieve financial success through a holistic approach to wealth management.

Please connect with me to get started.

TD Wealth