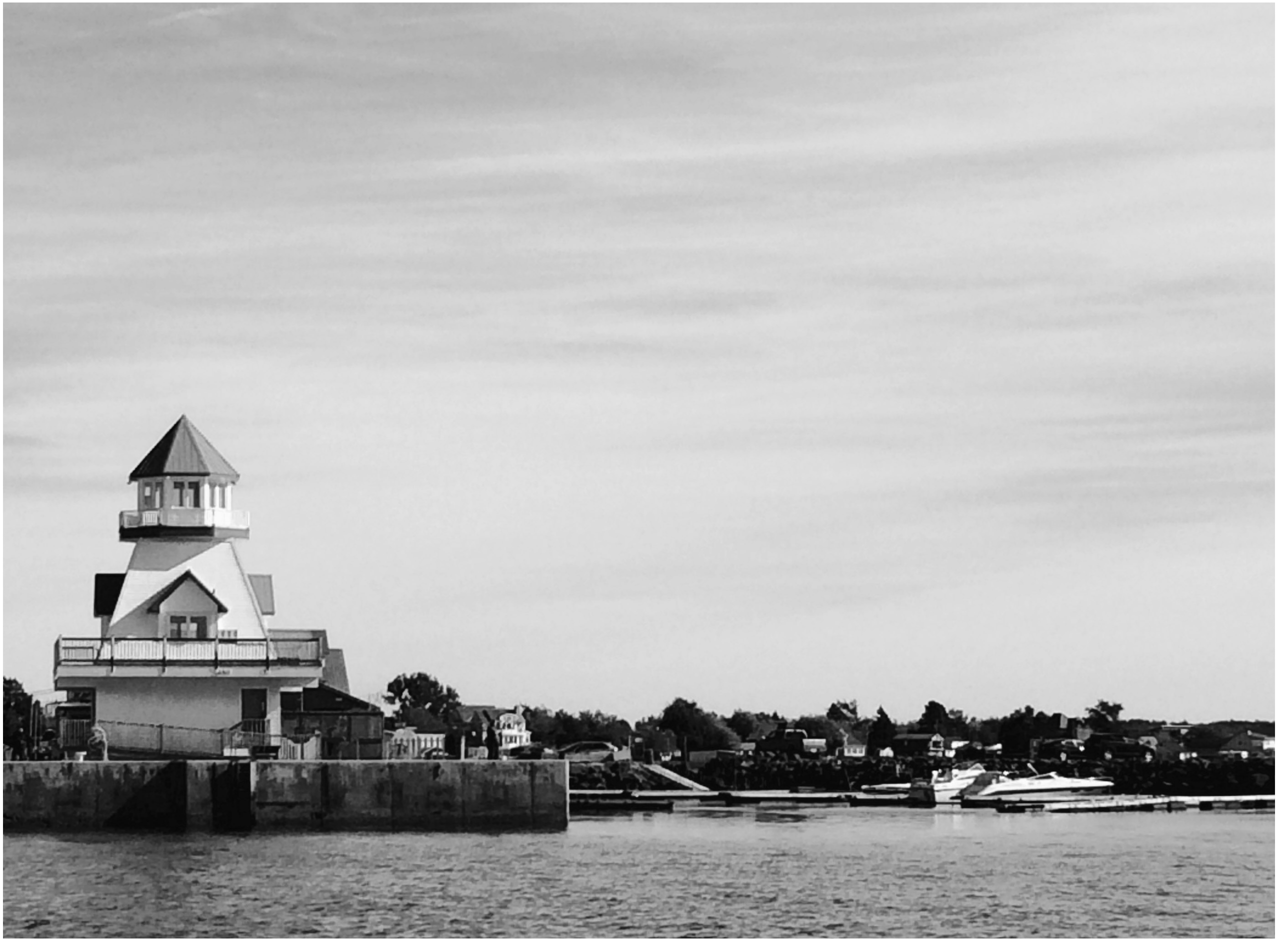
TD Wealth

Providing sound financial advice for a better tomorrow.

MacLean
Wealth Advisory Group



Mission Statement

At the MacLean Wealth Advisory Group we offer tailored investment advice and full-service wealth management designed to simplify and enhance your life. We deliver solutions with global scope and insightful expertise, through a deep personal relationship that enables us to truly understand your needs. Our long-term commitment means that our wealth services can grow and adapt with you, your family and your business, as you move through the many distinct phases of your life

Our Clients

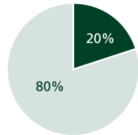
Our clients are affluent individuals, families, business owners, corporations and charities with considerable investable assets and wide-ranging, often-complex financial needs. Most are looking for consistent capital preservation and growth, integrated wealth planning, and thoughtful tax strategies to help them protect and grow their wealth to achieve their goals.

Service Model / Our Approach

We understand that managing considerable wealth can be complicated. Our goal is to simplify things for you by integrating all aspects of your financial picture into one comprehensive strategy, freeing you to focus on achieving your own personal vision of success. We understand the results you expect and the service you deserve—and we work to continually earn your business, through every interaction. Each member of our team shares the same service commitment to making your needs our highest priority.

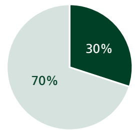
Investment Philosophy

We are a conservative wealth management team, first and foremost concerned with the management of risk through optimal asset allocation within a portfolio. We follow a regimented Core Dividend model with a well ordered discipline of analysis and review, respecting the uniqueness of each client. We work closely with you to identify your personal and/or business investment planning needs and goals, and then apply our considerable experience towards helping you preserve and grow your assets.



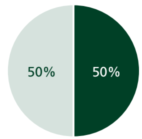
Conservative Income Portfolio

80 % Fixed Income
20 % Equities



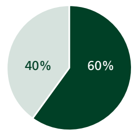
Balanced Income Portfolio

70 % Fixed Income
30 % Equities



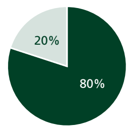
Balanced Portfolio

50 % Fixed Income
50 % Equities



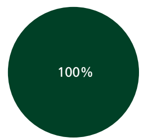
Balanced Growth Portfolio

40 % Fixed Income
60 % Equities



Growth Portfolio

20 % Fixed Income
80 % Equities



All Equity Portfolio

100 % Equities


40286

Investment Policy Statement (IPS)

Together, we will work with you to design your custom Investment Policy Statement, which will serve as the blueprint of your investment and wealth plan. We will take into consideration your appetite for risk, and short and long term investment goals in order to implement an appropriate strategy. Our team will keep a watchful eye on your portfolio, adjusting when needed to respond to market and economic events, allowing us to seize opportunities and navigate risk.

Our Integrated Approach

As our client, you can benefit from access to a range of TD specialists dedicated to helping to meet the needs of affluent clients, whether you're looking for:

- A retirement plan,
- Tax mitigation strategies,
- Business succession advice,
- Private banking solutions,
- Commercial banking solutions,
- Customized credit,
- Estate and trust services,
- Asset protection strategies, or
- Philanthropic planning.

At all times we are guided by your wealth plan and will keep a watchful eye on your overall strategy.

Our Team

Neal MacLean BBA, CFP, CIM

Neal began his career with TD Wealth in 2001 and brings over 15 years of experience to the Maclean Wealth Advisory Group. He is committed to providing exceptional first class customer service to his clients through honesty, transparency and open communication. The primary goal of Neal's investment strategy is to deliver customized wealth plan for each household's unique situation with the goal of allowing clients to focus on other areas of their personal lives with greater security.

Neal obtained his Bachelor's Degree in Business (BBA) from the University of New Brunswick and received his Certified Financial Planner (CFP) designation in 2004 and his Chartered Investment Manager (CIM) designation in 2012. His dedication to exceptional client experiences and innovative financial strategies are the foundations of the MacLean Wealth Advisory Group. In his spare time Neal enjoys sailing, golfing and participating in triathlons.

Janelle Sullivan BBA, CIM

Janelle joined TD Wealth in May of 2014 and has quickly become an integral part of the MacLean Wealth Advisory Group. Janelle provides a wide array of operational support including client service, trade order management, new client onboarding, and account maintenance. She is a graduate of the University of New Brunswick having earned a Bachelors degree in Finance (BBA) as well as a diploma in Investment Management through the New Brunswick Community College. In her spare time she enjoys running, yoga, volunteering and horseback riding.

Erin Bowes MBA

Erin has over 20 years' experience in the in the customer service industry having held past positons at Exxon Mobil and Bell Aliant prior to joining TD Wealth in 2011. Erin earned her MBA at the University of New Brunswick and provides a wide array of operational support to clients at MacLean Wealth Advisory Group. In all aspects of her career, Erin has focused on delivering the highest level of client service. She lives in Riverview with her husband and in her spare time enjoys photography, greyhounds and travelling.

Jenny Samson

Jenny is the cornerstone connecting our client's individual needs and incorporating them into day to day business practices. With close to 8 years in the field of providing exceptional client experiences, she also brings to the team her extensive knowledge and understanding of Retail Banking from her time spent working in the field. Jenny is responsible for compliance monitoring, client care and distribution of capital among various other duties. In her spare time she enjoys nature & outdoor adventure activities, keeping health and happiness the focal point in her life.

Jenny Samson, Janelle Sullivan, Neal MacLean, Erin Bowes

Contact us today

Our team can help you grow and preserve your wealth, and simplify your overall wealth management.

Please contact us for more information or to arrange a complimentary consultation in your home or office. We look forward to learning more about what matters most to you.

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