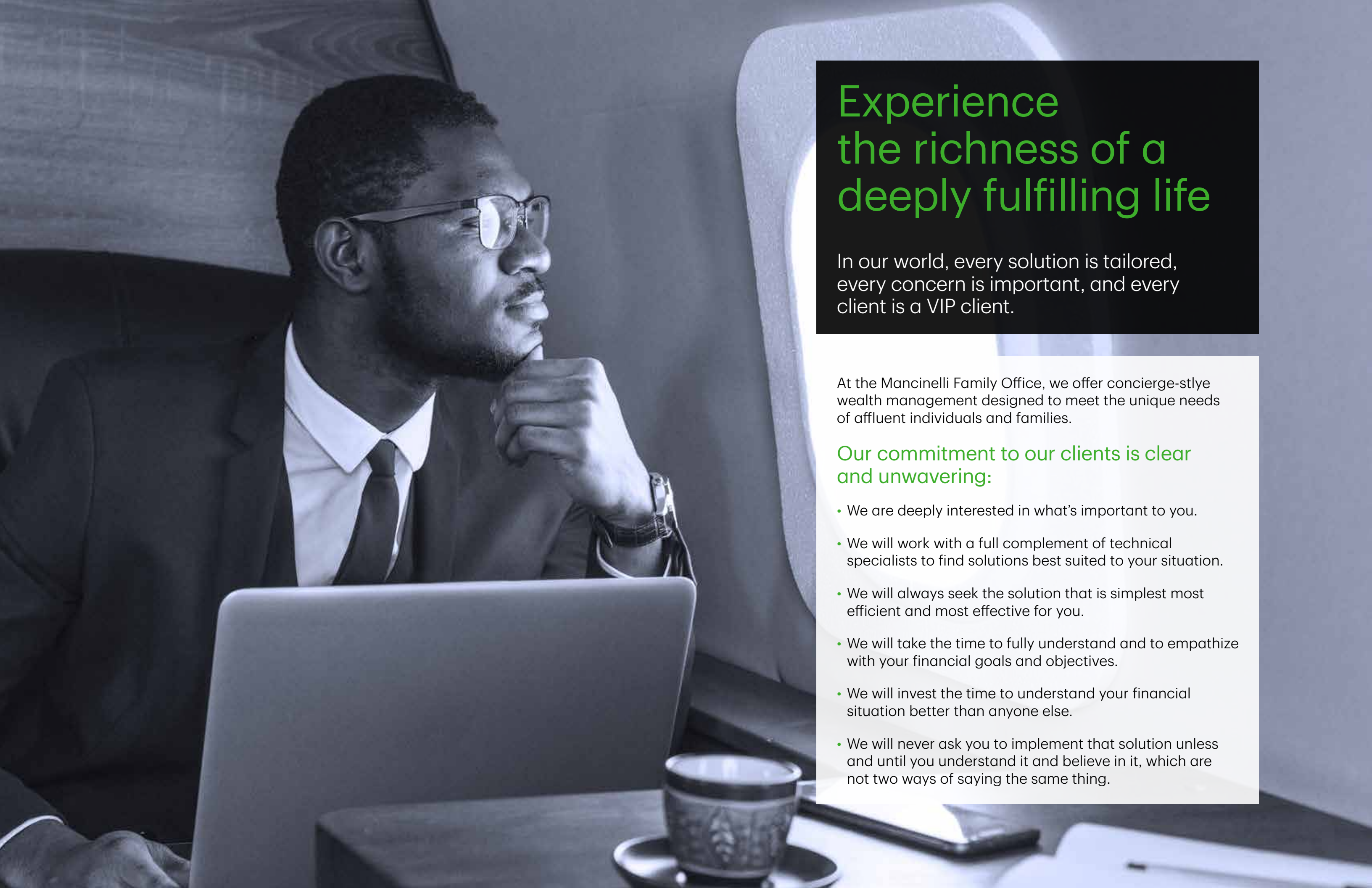


TD Wealth

Mancinelli
Family Office





Experience the richness of a deeply fulfilling life

In our world, every solution is tailored, every concern is important, and every client is a VIP client.

At the Mancinelli Family Office, we offer concierge-style wealth management designed to meet the unique needs of affluent individuals and families.

Our commitment to our clients is clear and unwavering:

- We are deeply interested in what's important to you.
- We will work with a full complement of technical specialists to find solutions best suited to your situation.
- We will always seek the solution that is simplest most efficient and most effective for you.
- We will take the time to fully understand and to empathize with your financial goals and objectives.
- We will invest the time to understand your financial situation better than anyone else.
- We will never ask you to implement that solution unless and until you understand it and believe in it, which are not two ways of saying the same thing.

Your Personal Wealth Playbook

Setting goals got you where you are today. Now it's time to set the goals you have for tomorrow.

Our proprietary Personal Wealth Playbook is a customized, living wealth companion that shows you exactly how we are helping you work toward a sustainable and meaningful financial future.

We help you align your values with your wealth — including the ways in which it is earned, managed, and spent — and put it all together into a game plan that clearly outlines the key financial planning action items we'll address over time.

As your life and priorities change, so too will your Playbook, as we continually seek new ways to help you maximize both your wealth and your personal fulfillment.

One of our key roles is to remove the personal biases and emotion that can often override logic in the wealth management process — and prevent you from reaching your wealth potential.

Build
net worth

Protect
what matters

Implement
tax-efficient strategies

Leave
a legacy

The advice you need to make the most informed decisions — and the resources to back it up

We are happy to work directly with your team of professionals, and anyone who is important to you, to help direct, coordinate and implement your wealth strategy.

Global Asset Allocation & Investment Strategy Consulting

Comprehensive Performance Reporting

Investment Manager Selection & Monitoring

Estate Planning & Wealth Transference

Philanthropic Planning

Insurance Strategies & Analysis

Debt Structure & Analysis — Bank Financing

Foundation Setup and Management

Risk Management & Asset Protection Consulting

Sufficiency & Retirement Planning

Financial Education Services

Document Management & Record Keeping

Bill Payment Services

Personal Financial Plan & Statement Preparation

Cash Management

Cross-Border Solutions

Coordination of Complimentary Advisors

Tax & Business Advisory

Portfolio Management

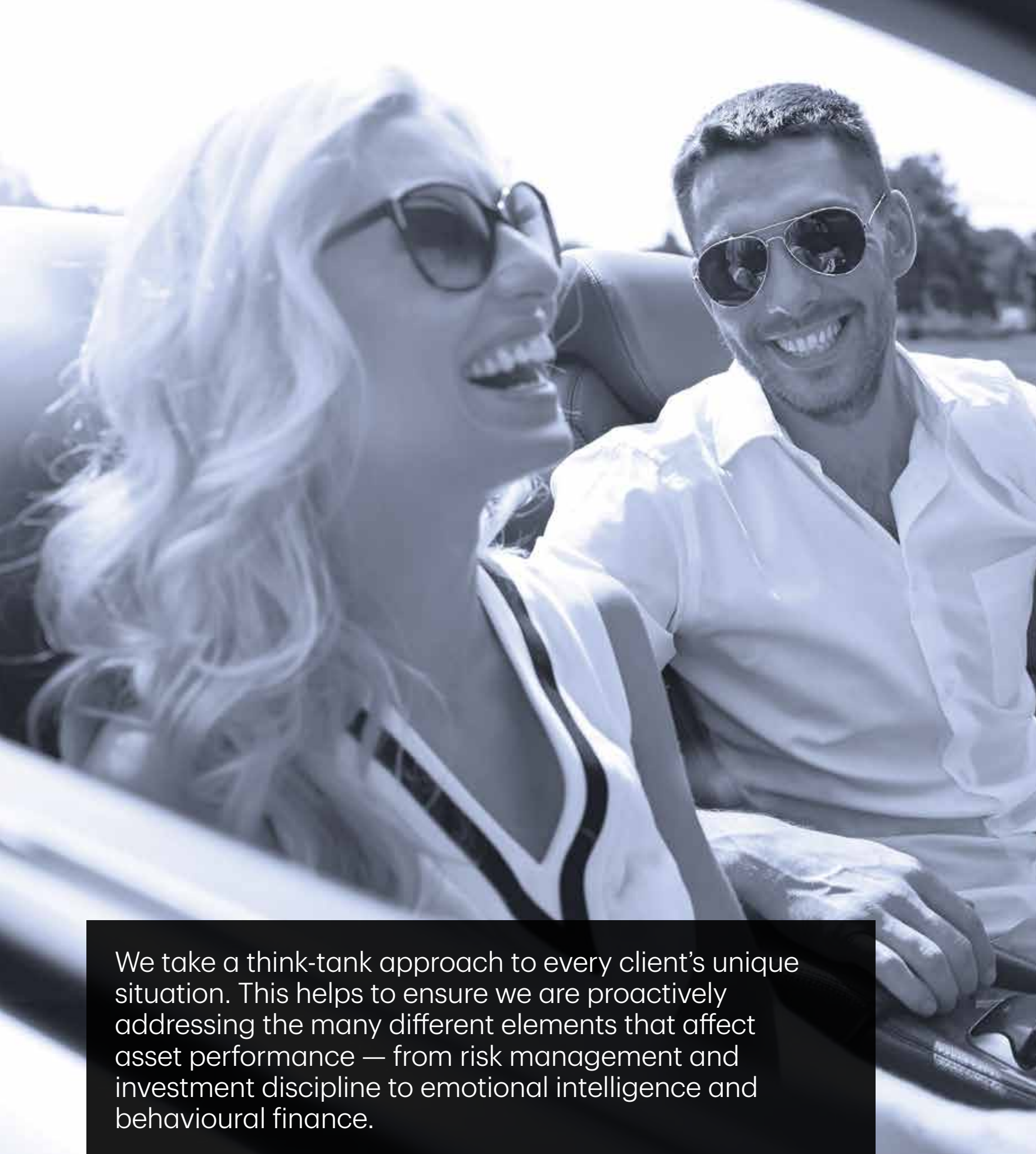
Private Banking (Canada & USA)

Family Tree & Wealth Integration

Family Meetings

Estate Trustee Services (Powers of Attorney, Executor Services)

Through our strong service delivery model, you receive a highly-integrated system of checks and double-checks that help protect you against errors, fraud and bad advice.



We take a think-tank approach to every client's unique situation. This helps to ensure we are proactively addressing the many different elements that affect asset performance — from risk management and investment discipline to emotional intelligence and behavioural finance.



Elly Mancinelli
Vice-President and Investment Advisor

“ As your lead relationship manager, I will be personally responsible for developing and coordinating your wealth strategy, supported by my dynamic in-house team and TD's industry-leading specialists. ”

Wealth Advisory Specialists

High Net Worth Planner

Develops comprehensive wealth plans to identify tax mitigation, insurance and estate planning strategies

Estate Planning Advisor

Develops tax-efficient wealth solutions

Private Banker

Provides sophisticated banking and credit solutions to High Net Worth clients

U.S. Affiliate

Provides a range of banking and wealth management strategies for individuals relocating to the U.S. from Canada

Business Succession Advisor

Provides expertise in the taxation of Canadian Controlled Private Corporations

Philanthropic Advisor

Creates streamlined, tax-effective legacy strategies

Private Client Wealth Advisor

Provides tailored banking, lending and investment strategies for clients relocating to the U.S. from Canada

Tax and Estate Planner

Advises clients on the structure of their wills and assists in setting up trusts

On Standby

You've already reached such incredible heights. Together, we'll help keep the momentum going and create a lasting legacy.

Mancinelli Family Office

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Toronto, ON M5S 1M2

416 790 1877

London

380 Wellington Street, 17th Floor
London, ON, N6A 5B5

519 675 4336

advisors.td.com/mancinellifamilyoffice



For more than 155 years, TD has helped generations of clients with their personal, family and business assets in the ways that matter to them.

We look forward to discovering what truly matters to you.

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