As a client of TD Wealth Private Investment Advice, we will strive to provide you with excellent service and sound wealth management advice tailored to your needs.

As part of our commitment to you, we take pride in working to deliver an exceptional client experience. Behind the scenes other TD specialists work on your behalf to provide leading-edge economic analysis, regional expertise, and astute risk management.

As your trusted wealth advisory team, our goal is to provide you with value-added services based on a deep understanding of your needs and goals, and to continually invest in our relationship.


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**TD Wealth**

# Our commitment to you

Martin
Wealth Management

# How We Help Our Clients

At Martin Wealth Management, we leverage our knowledge, skills and experience to help you take control of your financial life from start to finish. We liken ourselves to your "financial physician", assuming responsibility for the everyday management of your investment accounts but expanding our reach to support you in all areas of your financial health. Our ultimate goal is to eliminate your need to worry… after all, worrying is what you are hiring us to do.

## Leadership

- Work with you to become crystal clear about values, goals and current market realities
- Initiate discussions about topics that are often tough to talk about
- Give you *the gift of time*, if you don't have the energy or the inclination to consolidate more than forty hours per week worth of market research, financial planning considerations and legislative changes as we do

## Act as an Objective Third Party

- Take on the role of an "emotional anchor", raising you up when the investment environment is causing unease and keeping you level-headed when the markets are doing well and you become inclined to forget about the potential short-term risks inherent in investing
- Provide reason during periods of volatility, encouraging you to stick to the plan that we've carefully developed together

## Relevant Credentials

- Both Doug and Gillian graduated with their Bachelor of Commerce (Hons) from Queen's University and are Life Insurance Advisors with TD Wealth Insurance Services
- Doug holds the Certified Financial Planner (CFP®) designation and Gillian has her Master of Business Administration (MBA) in Investment Management and is a Chartered Financial Analyst (CFA®) charter holder
- Committed to learning and upgrading their skills, both Doug and Gillian complete annual continuing education credits and Gillian seeks to further pursue Responsible Investing and Certified Financial Planning designations

# What Sets Us Apart

## Focus on the Entire Wealth Picture

- Act as a one-stop shop, providing advice on topics beyond simply investments, so that you don't have to use multiple advisor-figures to deal with bits and pieces of larger-scale concerns
- Provide complimentary reviews with a network of other TD specialists (estate planners, insurance advisors, tax advisors) built through over fifty years of combined experience in the industry to discover opportunities in greater depth
- Offer multigenerational advice to assist you in caring for your aging parents, bring to light tax and legal considerations regarding your eventual inheritance, foster financial literacy among your children, and make sure your children are a part of your wealth plan if you so desire
- Ensure that you are investing your money in areas that align with your values by offering environmental, social and governance (ESG) conscious investment products

## Familiarity and Ease

- *Make the time* and *take the time* to have in-depth, meaningful, *face-to-face* meetings regarding detailed, *annotated* portfolio reviews
- Explain ourselves in plain language and offer analogies and relatable stories to de-mystify complex topics and empower you through financial education
- Celebrate in your milestones like your dream vacation, your eventual retirement, and the arrival of children or grandchildren
- Ensure the same, familiar person is available to answer your telephone calls and emails
- Address your concerns more comprehensively due to our intimate knowledge of your personal circumstances and your financial situation