Martin Wealth Management
TD Wealth Private Investment Advice
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What might the first year look and feel like as a client of Martin Wealth Management?

1. Discovery Meeting | Comprehensive interview covering topics not limited to your family, career path, savings history, short-term goals, vision for your retirement, what you own/owe, and the way in which your income is structured (salary, bonuses, share units, employer matching, corporate structure) | Generation of a Discovery Report to identify your Wealth Personality and any behavioural biases that may impact your long-term financial success

2. Onboarding Meeting | If we decide to embark on an advisory relationship with one another, we will meet to solidify investment risk/return objectives and expectations and to sign the required account documentation | Collection of monthly budget and retirement income information to enable us to craft a full Wealth Plan

3. Reinvestment Meeting | Upon the transfer in of your accounts, we will walk through each of your existing investments with you | We will recommend that you maintain or replace each investment, and will explain to you the 'why' behind our recommendations | We will illustrate what your accounts will look like (asset mix, geography and sector breakdown) by agreeing to proceed with our recommendations

4. Wealth Plan Presentation Meeting | Overview of our assumptions, the retirement income scenarios that we have modeled for you, and the next steps that you'll need to take to meet your savings goals

5. Will & Estate Planning | Complimentary session with a Tax & Estate Planner from TD Wealth, who will review your existing legal documentation and will address questions that you may have | Generation of a summary that you can take to your Will & Estate specialist lawyer to assist you in updating your legal documentation

6. Insurance Planning | Complimentary session with an Estate Planning Advisor from TD Wealth Insurance Services, who will review your existing policies from the perspective of income protection (risk mitigation) and/or estate maximization

7. Year-End Review Meeting | We will walk you through the performance of each of your investments and will make recommendations to rebalance your portfolio | Review of the progress that you have made toward the Wealth Plan

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