Martin Wealth Management
TD Wealth Private Investment Advice
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FEES and COMPENSATION

We take a transparent approach to fees, charging a set percentage of assets under management (AUM) fee for our tailored investment management and wealth planning advice. The fee schedule is tiered, resulting in a lower overall percentage fee as AUM increases.

The fees that we charge are apparent, easy to understand and predictable. Our fee structure aligns the interest of you, the client, and Martin Wealth Management - there are no hidden costs. Access to TD Specialists as a part of our planning process is offered on a complimentary basis. If there are third-party costs for the implementation of planning strategies that are charged by your lawyer or accountant, we would encourage you to inquire as to these costs prior to making any commitments.

We do not lock clients into products that prohibit them from accessing their savings for any time period. Our clients work with us not because they feel forced to, but because they value the service that we provide in holding them accountable to meet their goals and in helping them to navigate through periods of volatility.

Clients holding non-registered accounts may be eligible to deduct the full investment management fee for tax purposes. Please consult your tax advisor for more information.

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