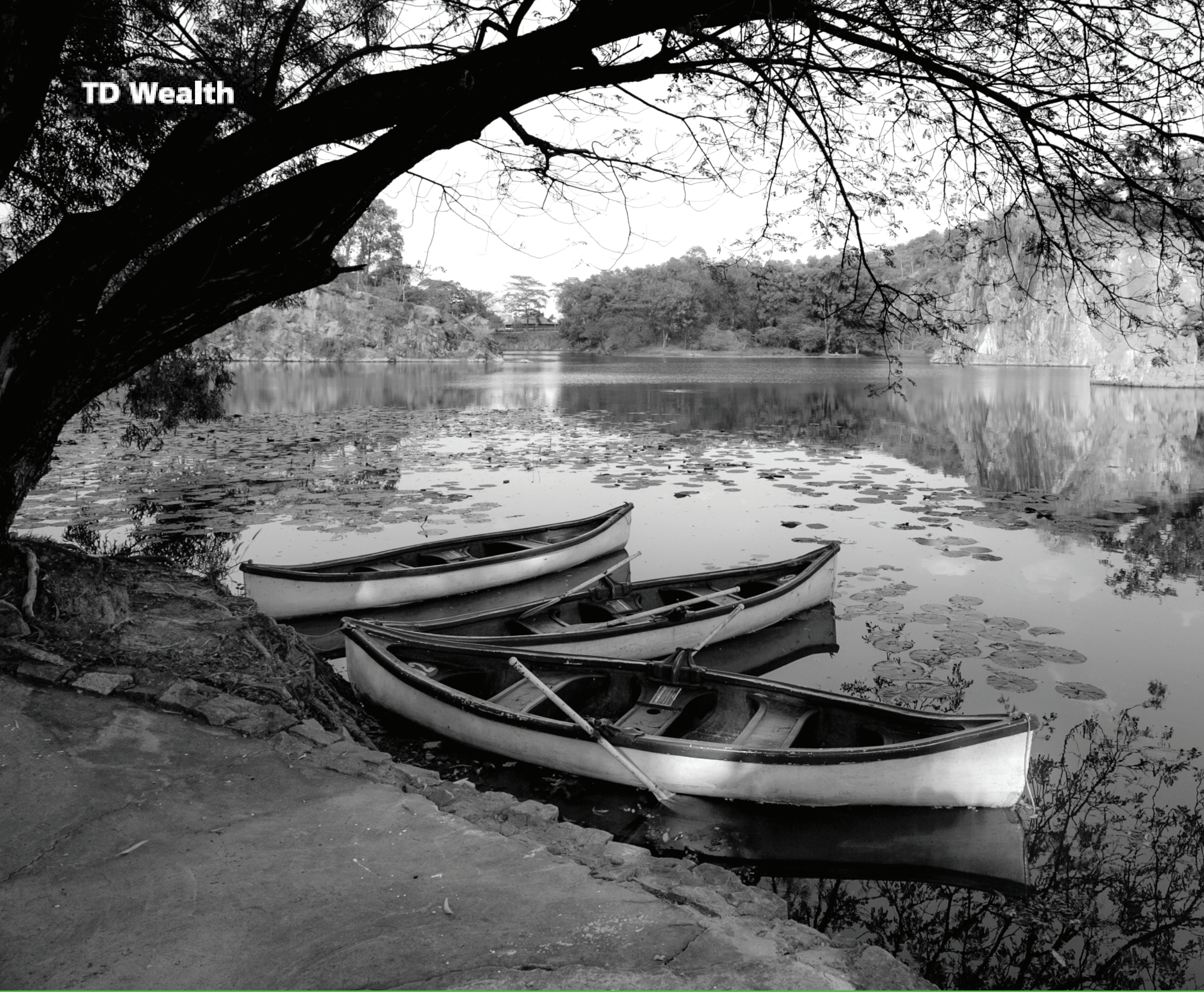


TD Wealth Private Investment Advice

Personalized wealth management designed for you

Crake Fowell Wealth Management

What we offer

At Crake Fowell Wealth Management we believe that an equal emphasis needs to be placed on risk management as well as a sound, disciplined investment strategy.

By utilizing a multi-asset class approach to constructing portfolios, we can ensure that proper diversification exists that can help reduce long-term volatility and help to enhance the long-term returns for our clients.

In collaboration with our clients, we determine the appropriate asset allocation that is specific to their goals and objectives and in turn create an Investment Policy Statement. This will provide the parameters whereby we can effectively manage the portfolio in a transparent manner.

Our Investment Philosophy is to help our clients to strategically accumulate, preserve and protect their wealth with passion while endeavouring to provide an unparalleled client experience.

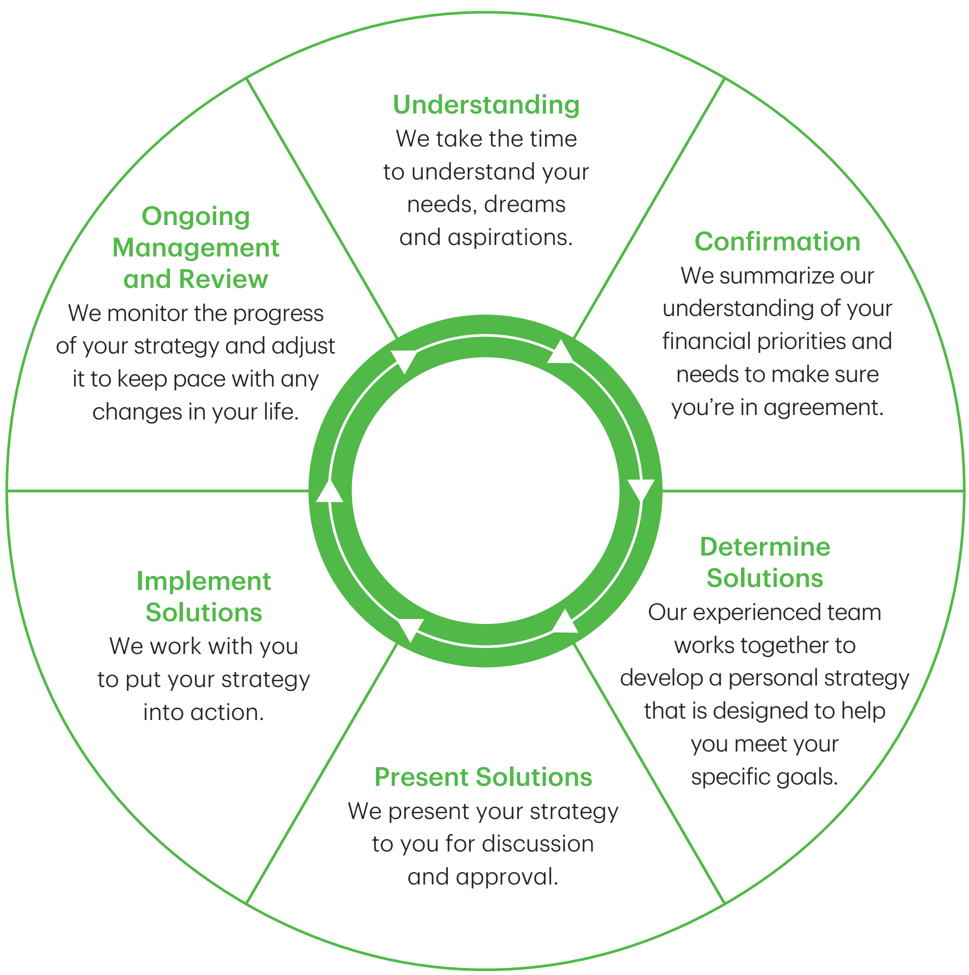
Our client-centred approach

Our relationship with you is the key to offering you tailored wealth strategies. The insight we gain from working with you is the basis on which we design your unique strategy that fits your goals. We understand what makes your situation different. We actively listen and gather in-depth information to establish a clear understanding of your goals.

We believe that your personal wealth strategy is key to your financial success. However, before we can begin to build your plan, we take the time to develop a deep understanding of you.

Understanding you

We start with a deep understanding of who you are, your values and your vision of success. This means reviewing the financial decisions you've made over the years, the goals you've set for yourself in the years to come, and the ways in which these reflect what is important in your life. To create your personal investment and wealth plan, we leverage our broad expertise to fit your unique needs.



A disciplined approach to investment management

Investment management is one of our key strengths and the cornerstone of every wealth strategy. Our investment philosophy is rigorous, disciplined and comprehensive, with a balanced approach to wealth preservation and growth.

We also draw on the expertise of a variety of TD investment professionals and risk management specialists. They provide our team with economic and market research that helps us not only manage your portfolio, but also identify the opportunities that lie in market shifts.

Getting the appropriate investment advice is a key part of managing wealth. But it's just one part of a bigger picture. You may also need to manage ongoing finances, minimize taxes or structure your estate in a tax-efficient manner.

Integrated wealth services

We take an integrated approach, bringing in other TD specialists as required to develop a custom wealth strategy. We assemble as a team in developing the solutions you require, such as:

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

Helping you achieve your vision of success

Building net worth

We know how important it is to build your wealth so you can enjoy life's priorities and achieve your vision for the future. Working together we can develop innovative strategies to help grow your net worth by identifying which credit strategies and investment solutions match your current lifestyle and needs. Our team of professionals can work with you to develop an effective plan to help you make your vision a reality.

Implementing tax-efficient strategies

You've worked hard to accumulate your wealth and we want to help you to make the most of it. Working closely with you and your tax advisors, we'll create an integrated wealth strategy that will structure your investment portfolio to help reduce tax exposure and keep income available as and when you need it.

Protecting what matters

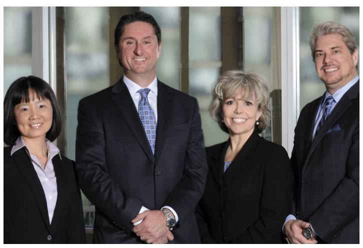
Life is filled with uncertainty and that's why we're committed to delivering advice and solutions to help protect the things you value at every life stage. Whether through comprehensive risk strategies or connecting you with a specialist in trusts, estates and other risk mitigation products, we've got the expertise to create a comprehensive plan that's right for you.

Leaving a legacy

You are the architect of your legacy and we can help you with the blueprint. We'll collaborate with you to identify your top priorities, from estate planning and trusts to gifting and philanthropy. Our goal? To help you optimize the transfer of your wealth.

Meet our team

Our team has been working with affluent clients and their families for many years. Complementing that wisdom is our commitment to ongoing industry training, with many of our team members having achieved multiple industry certifications.



Crake Fowell Wealth Management
Toll free: 800-382-4964
Fax: 416-512-6224

At Crake/Fowell Wealth Management, we are re-defining private wealth & life management!

We understand how important it is for you to build your wealth so that you and your family can enjoy the things that matter most to you and allow you to achieve your version of your future.

We help our clients develop innovative strategies to help grow, preserve and protect their net worth by identifying investment solutions that match their current lifestyle, risk tolerances and objectives.

With introductions to TD specialists in the areas of High Net Worth Planning, Estate Planning, Risk Management & Philanthropy and Gifting Strategies, we are able to help our clients plan for life's uncertainties and deliver advice and customized solutions to help protect the things they value the most at their different life stages.

You have worked hard to build your wealth and you want to keep as much as you can. We work closely with our clients' tax professionals to ensure that we are doing all we can to help minimize the negative effects of tax on their wealth plan.

Using Behavioural Finance, we are able to help our clients address their wealth management challenges on a level more personal and customized than simply looking at numbers. It is about removing as much of the emotion from the process as possible by being prepared with a plan and understanding clients goals and objectives.

You are the architect of your future and your legacy, but we can help you create your Blueprint!

We’re ready to begin the journey of helping you manage, preserve and transition your wealth. Shall we begin? Please contact us for more information or to arrange a complimentary consultation.

We look forward to learning more about what matters most to you.

Crake Fowell Wealth Management
TD Wealth Private Investment Advice
5140 Yonge Street, Suite 1600
North York, ON M2N 6L7
Toll free: 800-382-4964
Fax: 416-512-6224
www.CrakeFowellWealthManagement.com

Crake Fowell Wealth Management