Potential Realized.

MK Total Wealth Management Group

Understanding You.

At MK Total Wealth Management Group, discovering what truly matters to you is our top priority. Through our distinctive discovery process, we work with you to uncover the values behind your goals, identify your wealth priorities, and craft a tailored strategy that is unique to you.

As your life evolves, our professional guidance adapts alongside you, offering personalized attention every step of the way, helping to provide financial confidence for generations to come.

A Legacy Built on Trust.

For over 30 years, founders Jeff MacDonald and Peter Konidis have supported this practice into a legacy that is grounded in long-lasting client relationships. What began as a two-person team has grown into a strong team of dedicated professionals within TD Wealth Private Investment Advice.

Holistic Wealth Management

At MK Total Wealth Management Group, we go beyond investment advice. Supported by a network of resources, working closely with TD specialists, our team delivers a comprehensive service offering, allowing our team to address every aspect of your wealth.

- **Wealth Protection, Tax & Insurance:** In collaboration with TD Specialists, our team works with you to help you to protect your assets and minimize liabilities with thoughtful insurance solutions and tax-efficient planning.

- **Will & Estate Planning:** In collaboration with TD Specialists, we help coordinate wills, estate strategies, and trust solutions designed to help protect what you've built and provide a smooth transition of wealth.

- **Business Succession:** Our team helps business owners plan for the successful transition of their companies. By coordinating financial, tax, and estate strategies with legal and accounting professionals, we help create a clear roadmap that is designed to help protect the value of the business, supports continuity, and provides a smooth transfer to the next generation or future owners.

- **Charitable Giving & Philanthropy:** At MK Total Wealth Management Group, we believe that true wealth is the ability to make a difference. Our team works with you directly to align your wealth with meaningful impact, through unique offerings, and access to the Private Giving Foundation.

- **Retirement & Wealth Planning:** Our team believes that your wealth plans should be as unique as you are. Through personalized wealth strategies, tailored to your life today and your goals tomorrow, our team supports you in building and protecting your wealth to allow you to confidently pass on your legacy, tomorrow.

Private Portfolio Management

MK Total Wealth Management Group's private portfolio management reflects our belief that successful investing demands discipline, structure, and experienced oversight. It is a discretionary investment approach designed for clients who value a thoughtful, consistent process, one that prioritizes long-term outcomes over short-term market noise and removes the burden of day-to-day decision-making.

Our portfolios are built within a structured investment framework that combines quantitative insight with ongoing professional judgment. We focus on high-quality Canadian and U.S. companies, selected through clearly defined criteria such as valuation, financial strength, dividend sustainability, and long-term return potential. Each holding is chosen with purpose, contributing to a portfolio designed to be both resilient and adaptable.

This disciplined methodology reduces emotional decision-making and reinforces consistency through changing market conditions. By maintaining a clear process and continuously monitoring each investment, we aim to deliver a more stable and predictable investment experience.

Ultimately, our approach is designed to provide clarity and confidence, overseeing that every portfolio is managed with intention, accountability, and a long-term perspective.

Active Stewardship

We believe what sets MK Total Wealth Management Group apart is active stewardship.

Portfolios are monitored consistently and adjusted with purpose to remain aligned with each client's objectives. The result is a transparent, professionally managed investment experience designed to provide confidence and clarity.

Data Driven, Disciplined & Dynamic

Our privately managed portfolios combine institutional rigor with a highly personalized investment strategy, bringing together deep research, advanced analytics, and active oversight to deliver a disciplined and responsive investment experience.

- **Rigorous Research:** Supported by TD specialists, our team draws on extensive industry expertise and resources to conduct ongoing oversight and thorough due diligence, ensuring every investment meets a high standard of quality.
- **Quantitative Analysis:** Using proprietary models tailored to conservative, moderate, and aggressive mandates, we systematically rank and screen leading Canadian and U.S. equities, identifying top-tier opportunities aligned with your specific strategy.
- **Qualitative Analysis:** Beyond the numbers, we continuously evaluate the underlying fundamentals behind TD Securities' best ideas, ensuring that only companies meeting strict quality and performance criteria are selected.
- **Focused Criteria:** Investment decisions are guided by key metrics including dividend yield, fair valuation, return to target, dividend growth potential, and strong corporate financial health.
- **Strategic Investment Framework:** We deliver a transparent, personalized strategy tailored to your goals, supported by regular performance benchmarking and active daily rebalancing to maintain alignment, even in volatile market conditions.

This integrated approach ensures that every portfolio is built with intention and managed with precision.

The Trim Function

Every portfolio begins with a disciplined foundation: each company is assigned an equal weight, ensuring no single position dominates at the outset. From there, our trim function applies a structured, rules-based approach that removes emotion from decision-making.

As markets move, holdings naturally drift from their original weights. Rather than reacting impulsively, we follow defined “trim up” and “trim down” guidelines. When a holding declines but its long-term fundamentals remain intact, we selectively add, taking advantage of more attractive valuations. When a position appreciates and exceeds its intended weight, we trim it back, capturing gains and preventing overexposure.

This disciplined rebalancing reinforces consistency, systematically buying at more favourable prices and scaling back when valuations become extended. The result is a smoother investment experience, stronger diversification, and a portfolio that evolves with intention rather than reaction.

More Than Investment Advisors

Jeff MacDonald

Senior Portfolio Manager,
Senior Investment Advisor

Jeff and his team have been transforming how families and organizations think about wealth stewardship since 1993. Their mission is to build one of Canada's premier advisory teams; delivering exceptional client experiences through tailored, total-wealth strategies that help individuals and families build, preserve, and purposefully transition their wealth to the generations to come.

With deep experience supporting high-net-worth families, Jeff is committed to ensuring that wealth is not only managed wisely today but understood by the next generation. His team takes pride in guiding families through the complexities of multigenerational planning, helping them articulate their values, strengthen financial confidence across generations, and leave a meaningful legacy. Central to the team's philosophy is the belief that true wealth is the ability to make a difference, within families, communities, and society.

Jeff began his career in the investment industry in 1993 after graduating with an Honours Bachelor of Business Administration from Wilfrid Laurier University. Throughout his career, he has demonstrated unwavering dedication to exceptional client service by understanding their goals, priorities, and aspirations at every stage of life.

Married and a father of two, Jeff devotes his personal time to activities that keep him close to family, whether in the community or spending time together up at the cottage. His commitment to family values is reflected in the work he does every day: helping others protect what matters most and build a legacy that can endure.

More Than Investment Advisors

Peter Konidis

Senior Portfolio Manager,
Senior Investment Advisor

Since the early 1990s, Peter has been helping families and organizations navigate the evolving landscape of wealth with clarity, purpose, and confidence. His leadership has been instrumental in shaping an advisory practice known for its depth of expertise and its commitment to delivering an exceptional client experience grounded in thoughtful, comprehensive wealth strategies.

Peter has built his career on guiding high-net-worth families through complex financial decisions, helping them to ensure their wealth is protected today and thoughtfully positioned for future generations. He places strong emphasis on helping families prepare the next generation, strengthening financial understanding, fostering shared values, and helping to ensure that wealth becomes a positive and empowering force.

For Peter, wealth is most meaningful when it enables families to make a lasting difference.

Peter first entered the investment industry in 1992 after earning a Bachelor of Commerce and Finance from the University of Toronto. Over the decades, his dedication to client service, careful listening, and sound financial judgement have remained the cornerstone of his professional approach.

Away from the office, Peter is deeply family oriented. Married with two children, he spends his free time enjoying the company of family and close friends. His personal values anchor his work; helping clients protect what matters most and build enduring legacies for the generations that follow.

Your Team of Trusted Professionals

Daniela Porretta

Associate Investment Advisor

Michael Mihajlov

Administrative Associate

Ching Yiu (Yoyo) Ng

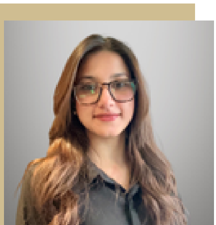
Client Relationship Associate

Phil Conroy

Client Service Associate

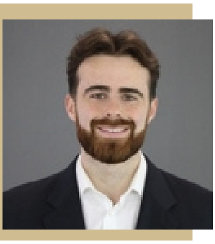
Maria Konidis

Client Service Associate



Shaiqua Hassan

Client Service Associate



Ben Lassaline

Client Service Associate

We’ve got a team for that.

A Complete Advisory Network

Beyond our core team, we collaborate with an extended network of TD specialists, enabling MK Total Wealth Management Group to deliver a comprehensive, full-service experience that goes far beyond traditional wealth management. Our team collaborates with TD Specialists to support a full service offering, with specialization in:

Estate Planning

Structuring your wealth to provide a smooth, tax-efficient transfer to the next generation, aligned with your wishes.

Business Succession

Developing clear transition strategies to preserve value and provide continuity - whether passing the business to family or preparing for sale.

Tax Planning

Identifying opportunities to enhance after-tax returns through thoughtful structuring and ongoing planning.

High-net-worth strategies

Delivering tailored solutions for complex portfolios, including advanced planning, risk management, and weather preservation.

An Offering Unique to You

We believe that your financial future deserves more than a one-size-fits-all solution. For over 25 years, we've built trusted relationships built on understanding what matters most to you, and align every strategy with your goals and values. Our disciplined approach to investing, supported by proprietary models, strict performance metrics, and active daily oversight, removes emotional decision-making and ensures your portfolio stays on course.

Supported by the strength and insight of TD, our team pairs institutional-level research with tailored guidance to deliver a comprehensive range of solutions, going beyond investments, and encompassing tax planning strategies, estate strategies, business succession, and legacy planning. With MK Total Wealth Management Group, you gain a professional who understands your path, evolves with your needs, and is committed to helping you to protect, grow, and simplify your wealth at every stage of life.

A Legacy That Lives On

At MK Total Wealth Management Group, our team believes wealth is deeply personal. Your wealth represents years of hard work, sacrifice, intention, and most importantly, the future you envision for the people you love. Generational wealth is not just about passing on assets; it's about passing on security, opportunity, and confidence in the future.

Our relationship with you begins by listening; we take the time to understand what truly matters to you, your family, your values, and the legacy you hope to leave behind. From there, we design strategies that are meant to endure, helping you to ensure your wealth continues to support your family for generations to come. Every detail is thoughtfully coordinated to reduce uncertainty, protect your intentions, and create a smooth transition of wealth when it matters most.

At MK Total Wealth Management Group, our purpose is simple: to help you feel confident that what you've built will continue to support the people you love today, tomorrow, and for generations to come.

Scan for more information about our team.

Because true wealth is the ability to make a difference.

Contact Us

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At MK Total Wealth Management Group, ‘Total Wealth’ isn’t just a name; it’s how we think, plan, and act.

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