A Comprehensive Approach To Help Build and Protect Wealth

Northern Shores Wealth Management
TD Wealth Private Investment Advice
33 Collier Street, 3rd Floor
Barrie, Ontario, L4M 1G5
http://northernshoreswealthmanagement.com

Northern Shores
Wealth Management

TD Wealth

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Located on the Northern Shores of Kempenfelt Bay, and with over seventy years of combined financial expertise, the Northern Shores Wealth Management team helps families and business owners reach and achieve their financial goals and dreams.

To help you meet your goals, we take a comprehensive approach that extends beyond investing. We offer you the relevant, comprehensive wealth advice you deserve – and we can only do that by fully understanding you.

As your needs change and evolve over time, we will tailor our services, solutions and strategies accordingly. Whether you are building your career or business, shifting into retirement, or already enjoying your retirement, we believe that our disciplined approach will help make you more confident in your decisions and more focused on your future.

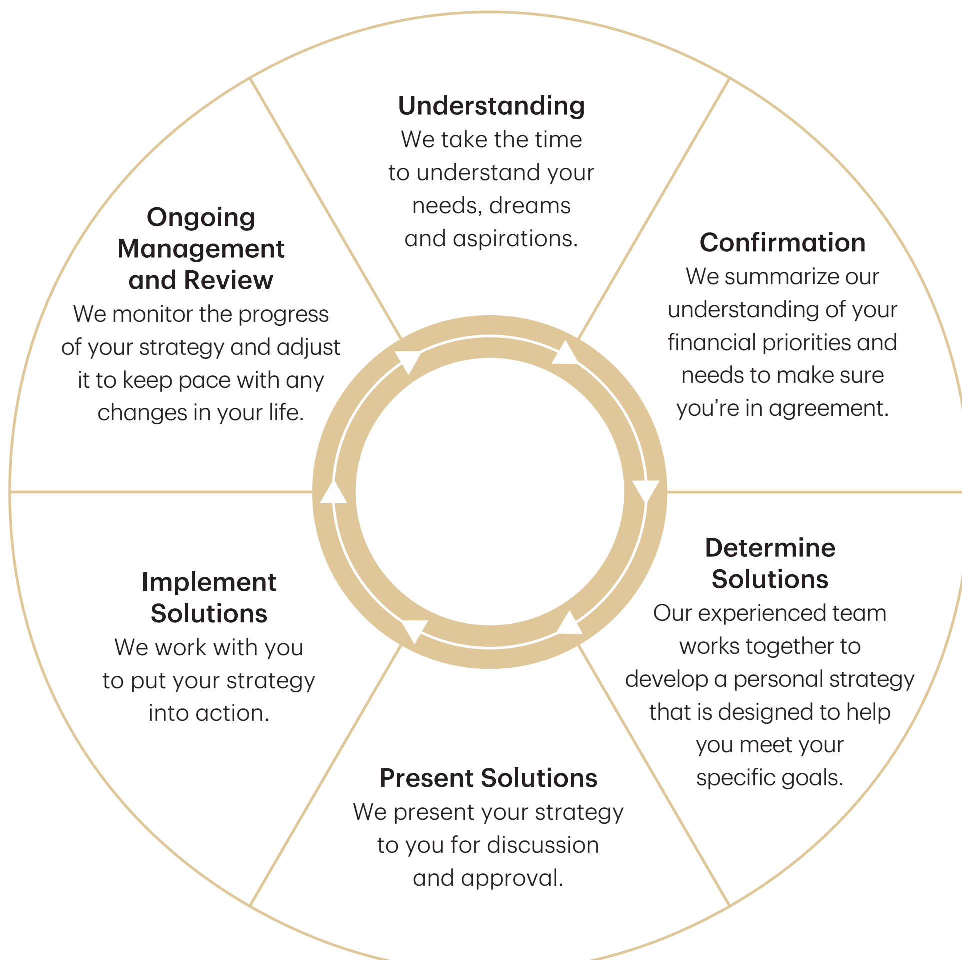
Our Client-Centred Approach

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
- Customized credit
- Asset protection strategies
- Philanthropic planning
- Estate and trust services

Helping You Achieve Your Vision of Success

Building net worth	**Implementing tax-efficient strategies**	**Protecting what matters**	**Leaving a legacy**

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.

Taylor Quinn, CFP®, CIM®
Senior Portfolio Manager
Tel: 705-726-3432
taylor.quinn@td.com

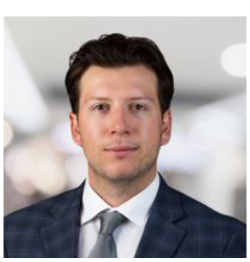
Taylor is a Senior Portfolio Manager & Senior Investment Advisor for the Northern Shores Wealth Management team at TD Wealth Private Investment Advice. While serving clients over the past 25 years, Taylor has developed long-lasting and rewarding relationships through his comprehensive planning and reliable advice. As a holder of the Certified Financial Planner (CFP®) and Chartered Investment Manager (CIM®) designations, Taylor helps families, professionals and business owners protect and grow their wealth using strategies that encompass retirement and estate planning strategies, risk management, as well as investment and tax planning strategies.

Kyle Green, CFP®, CIM®
Investment Advisor
Tel: 705-726-3907
kyle.green@td.com

Kyle has over 15 years of experience providing financial advice to individuals and corporations. He prides himself in building strong long-term relationships with clients, offering customized advice that aligns with their unique financial situation. As a holder of the Certified Financial Planner (CFP®) and Chartered Investment Manager (CIM®) designations, Kyle has the expertise to provide advice on a wide array of financial topics. Along with a team of TD specialists, Kyle has a focus on portfolio construction, cash flow planning, tax minimization strategies, retirement planning and estate planning.

Stephanie Rushton
Client Relationship Associate
Tel: 705-726-6784
stephanie.rushton@td.com

Stephanie is a Client Relationship Associate with the Northern Shores Wealth Management team. She provides broad support that focuses on client satisfaction, as well as specialized support in wealth planning and relationship management. Since joining Northern Shores in 2019 from TD Canada Trust, Stephanie has leveraged her strong financial background, bringing over 15 years of banking experience here in Barrie.



Jacob Roberti
Client Service Associate
Tel: 705-726-3605
jacob.roberti@td.com

Jacob is a Client Service Associate on the Northern Shores Wealth Management team, where he provides comprehensive support to the team & clients. With a strong desire to build on his foundation of financial knowledge and skills, he looks to continue to grow and to add value to the team wherever he can. He is dedicated to ensuring that clients' financial goals are met through diligent analysis and personalized service.

Additional TD Specialists

Georgia Swan, B.A., LL.B.
Tax & Estate Planner
TD Wealth

Georgia, as the Tax and Estate Planner of the Wealth Advisory Services team applies expertise in estate, trust and tax planning to assist you in developing an estate plan that reflects your personal choices for the future, and the legacy you will leave behind. To help manage your responsibilities, we can work with other TD specialists and external subject matter experts to help identify issues and properly structure your estate in a tax effective manner.

Mike Walkey
Estate Planning Advisor
TD Wealth Insurnace Services

Mike is an Estate Planning Advisor with TD Wealth Insurance Services. As your experienced Estate Planning Advisor, he will work with you to help determine the form of coverage for all your financial and non-financial assets in case of unforeseen events. The strategic use of life, disability, living benefits and annuity products can also help you preserve your wealth, sustain your business, and minimize tax obligations.

Alicia Andrew
High Net Worth Planner
TD Wealth

Alicia, as the High Net Worth Planner of the Wealth Advisory Services team, works collaboratively with TD Advisors to provide their clients with tax and retirement planning to assist them in developing a Wealth Plan. Alicia will work with clients and their tax and legal advisors, as appropriate, to provide comprehensive wealth planning strategies including determining retirement income needs, identifying complex tax and estate planning considerations, planning for private corporations, and creating tax-efficient charitable giving plans.

Samantha Hill
Executive Trust Officer
Td Wealth Private Trust

Samantha is an experienced Executive Trust Officer that provides a full-range of Estate and Trust services including supporting you with Will and Power of Attorney for property (POA) planning needs, when you are interested in appointing a Professional Corporate Executor or Attorney. She will also explain how we can assist you if you are acting in these roles. Her team is focused on building a long lasting relationship with you and your family in order to assist in the management of your financial and estate plans throughout the accumulation, preservation and transition periods.

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