Oberman Wealth Management Group
Our people: Your team

Oberman
Wealth Management Group

TD Wealth

Clarity.

Conviction.

Consistency.

Communication.

The Oberman offering

We provide tailored investment advice within a full-service wealth management framework. Our unique solutions are designed to help simplify and enhance your life.

We develop genuine personal relationships built on mutual trust, honesty and communication. Our team believes in building long lasting relationships that evolve as your needs change over time.

Families we work with

Our clients are affluent individuals, families, business owners, and corporations with a wide variety of complex financial needs.

Investors we advise are generally looking for consistent capital preservation, balanced growth, integrated wealth planning, and thoughtful tax strategies to help them protect and grow their assets.

Making your needs our highest priority

We understand that managing wealth can be complicated. Our goal is to help simplify the process by integrating your financial picture into one comprehensive strategy.

This holistic plan then releases you to focus on achieving your own personal vision of success, while we concentrate on executing your strategy.

We aspire to deliver the results you expect and the service you deserve, and are committed to continually earning your business throughout the course of our relationship.

Investing in life's priorities

Implementing tax-efficient strategies

Leaving a legacy

Protecting what matters

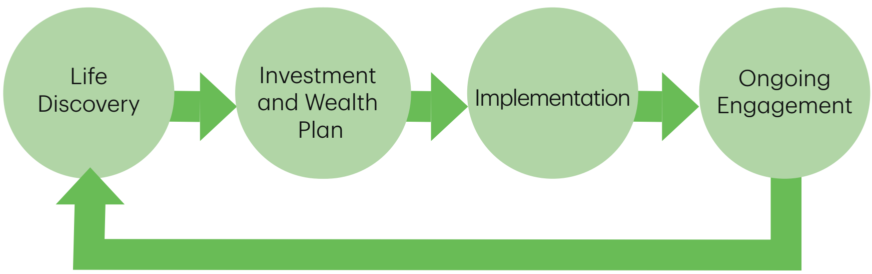
Your personal wealth strategy

We believe that your personal wealth strategy is the foundation of your financial success. This begins with a thorough understanding of the most important aspect of this plan – you.

Together, we will explore your values and beliefs, your financial past and present, including family dynamics and professional interests, as well as future goals for yourself, your family and your business.

Once the complete picture has been established, we carefully assist you in creating your personal wealth plan that acts as the road map to help achieve your goals.

Recognizing that your needs change over time, our plan will evolve and incorporate the appropriate services and solutions. Whether you are building your career or business, or shifting into retirement, we have the breadth of expertise to design a plan that can help make you more confident in your decisions, and more focused on your future.



A disciplined, balanced approach to your investment portfolio

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

This philosophy helps us ensure strong and stable growth of your assets in a wide range of market conditions.

We also draw on the expertise of a variety of investment professionals and risk management specialists at TD. 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.

An integrated wealth management approach

To help you meet your goals, we take a comprehensive approach that extends beyond investing. We can connect you with a dedicated team of TD Specialists.

YOU

Oberman Wealth Management Group

- Portfolio Management
- Investment Advice
- Private Banking
- Wealth Advisory Services
- Small Business Banking
- Commercial Banking
- Estate and Trust Services
- Capital Market Services
- Direct Investing

Your team

Collectively, the Oberman Wealth Management Group brings more than 75 years of experience working with affluent clients to manage the wealth and future of each unique individual and their circumstances.

Adam Oberman, B.Comm. (Hons.), CIM®, FCSI®
Senior Investment Advisor
adam.oberman@td.com

Clarity, conviction, consistency and communication are the four building blocks that best describe Adam Oberman's approach to wealth management. As an advisor to professionals, families and businesses with complex needs, Adam believes in total wealth planning. While day-to-day investment recommendations and portfolio building are incredibly important to his clients, Adam's comprehensive approach to wealth accumulation also encompasses strategies related to wealth, estate and tax planning, as well as risk mitigation, and legacy creation.

Supported by the national and global resources of TD Wealth and the TD Bank Group, Adam brings a wide range of financial disciplines and extensive industry experience to his work as an Investment Advisor, including his previous roles in branch management and options trading.

Adam holds a Chartered Investment Manager designation that acknowledges he has the expertise necessary to provide money management services to high-net-worth and institutional clients. He holds the Certificate in Retirement Strategy and is a a Fellow of the Canadian Securities Institute – one of the highest honours in Canadian financial services. He is also a Life Insurance Advisor through TD Wealth Insurance Services.

Leading a team fluent in English and Cantonese, Adam's personal approach to his work is reflected in his passion for, and commitment to, client service. He holds an Honours Bachelor of Commerce degree from McMaster University. Adam enjoys spending time with his wife and three sons, and travelling to different parts of the world each year. His hobbies include golf, biking, skiing and running.

Oberman Wealth Management Group

Lorraine Athaide, BBA (Hons), CIM®
Associate Investment Advisor
lorraine.athaide@td.com

Lorraine is an Associate Investment Advisor with Oberman Wealth Management Group. Lorraine holds the Chartered Investment Manager (CIM®) designation and is a Life Insurance Advisor through TD Wealth Insurance Services. Lorraine has also successfully completed Level II of the CFA Program and has over 12 years of investment industry experience.

Before joining TD Wealth in 2015, Lorraine worked with Gluskin Sheff + Associates in the Client Wealth Management division, focusing on business development, client service and portfolio management. Prior to that, Lorraine held positions in equity research, investment banking and public accounting.

Lorraine received a Bachelor of Business Administration degree from Wilfrid Laurier University with Honours, Distinction and a major in Finance.

In her personal time, Lorraine enjoys cooking and staying active through activities such as cycling and running.

Betsy Lee
Client Relationship Associate
betsy.lee@td.com

Betsy brings over 20 years of investment industry experience to her role with the Oberman Wealth Management Group. She works closely with Adam and the team to provide clients with insightful investment planning, comprehensive wealth management solutions and support, and specialized expertise in retirement planning.

With a professional background as Head Administrator for a prominent national real estate company, Betsy joined RBC Dominion Securities as a Client Service Associate in 1999. She then moved to HSBC Securities in 2004, working as a Branch Administrator and Assistant Investment Advisor. Betsy joined the Oberman Wealth Management Group as an Assistant Investment Advisor in 2008 and currently serves as a Client Relationship Associate. Betsy is fluent in English and Cantonese.

Leanne Pestell

Client Service Associate

leanne.pestell@td.com

Leanne is the newest member of our team. She has been with TD for over 10 years and started her career at TD Canada Trust as a Customer Service Representative. In 2017, Leanne joined TD Wealth Private Investment Advice and continues to devote time and energy to her professional career.

Leanne graduated from the University of Guelph in Sociology. Her knack for building strong rapport with clients and peers makes her an asset to our team.

In Leanne's personal time, she enjoys spending time with her husband and daughter, and trying new recipes.

Payal Depala

Administrative Associate

payal.depala@td.com

Payal joined TD Wealth in 2020, as an Administrative Associate. Her meticulous attention to detail with day to day operations allows the team to focus on what really matters, going above and beyond to meet and exceed clients expectations.

Payal received a Bachelor of Honours degree in Business Management with Marketing from the University of Westminster. Prior to relocating from London, England in 2019, Payal was an office administrator for a UK-based property consultancy firm.

In her free time, Payal enjoys spending time with friends and family, long walks with her dog and keeping active.

Jaqueline Harris

Administrative Associate
jaqueline.harris@td.com

Jaqueline joined TD Wealth in 2022, as an Administrative Associate. Jaqueline's keen eye for detail and commitment to achieving the highest standards contribute to her ongoing growth and success.

Jaqueline is currently working towards a diploma in Business Executive Administration. Prior to joining TD Wealth, Jaqueline held positions in client focused roles for over 10 years. Jaqueline is passionate about providing the best support and care for our clients.

In her personal time, Jaqueline enjoys acrylic painting and spending time with her husband and two children.

Gloria Oberman

Administrative Associate
gloria.oberman@td.com

Gloria plays a key role in the day-to-day operations of the Oberman Wealth Management Group, ensuring the smooth and efficient maintenance of client accounts.

More than 15 years of industry experience, including numerous client-facing roles as well as branch management, have deepened Gloria's understanding of the unique needs of affluent clients, their families and their businesses. She shares the Oberman Wealth Management Group's commitment to providing each client with the highest possible level of service in every interaction.

When she isn't busy with her three sons, Gloria enjoys cooking and experiencing foods of different cultures.

We look forward to working alongside you and your family to help you achieve your goals.

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