TD Wealth

Cardone Wealth Management Group

Creating the roadmap to your family's future

At Cardone Wealth Management Group, we deeply respect our role in your financial security and understand that no two families are alike. Your wealth needs are unique and your strategy should align with your personal values. We spend considerable time getting to know you, your circumstances and your ambitions before designing your wealth plan.

By truly understanding your priorities, we can crystallize specific goals and establish the roadmap to help you achieve them.


What matters to you
matters to us

The **Four Pillars of Wealth** approach at TD Wealth balances four key elements of your financial life.

Building your net worth

We recognize how important it is to build on your wealth so you can enjoy the things that matter most to you and achieve your vision for the future.

Tax efficiency

You have worked hard to succeed and we want to help you make the most of your wealth by creating strategies that help minimize tax and keep income available as you need it.

Protecting what matters most to you

Because life is filled with uncertainty, we are committed to delivering advice and solutions to help protect the things you value most at every stage.

Leaving the legacy you envision

You are the driver of your journey; we help you map out the route. Our goal is to help you optimize the transfer of your wealth to those you care about most.

With these pillars as our guide, our dedicated team works closely with you to build thoughtful, customized strategies designed to evolve over time as your lifestyle changes.

Planning for the certainty of uncertainty

Your wealth is your future. As your trusted advisors, we work closely with you to create an integrated wealth strategy that thoughtfully considers risks and opportunities as they apply to your unique lifestyle goals, personal circumstances and family dynamics.

Working together, we can help you make objective decisions under pressure.

We don’t predict the future;
we plan for it.

Working together

Meet

We start by meeting in-person to get to know each other. We ask a lot of questions and answer all of yours.

Present

Based on our in-depth discussion and portfolio review, we present, discuss and confirm any modifications to your proposed wealth plan.

Implement

In collaboration with a select team of TD Specialists, our team executes on each element of your strategy.

Communicate

Together, we regularly review your plan and progress toward your goals — listening closely to your feedback and answering all of your questions.

Adapt

Planning never ends. We continually analyze and adjust your plan, as needed, based on your evolving lifestyle needs.

Investment strategies

Retirement planning

Tax efficiency

Planning for major purchases

Cash-flow management

Protecting your assets

Education savings

Charitable giving & philanthropy

Business succession support

Wealth transfer

Trusts and Wills

Private banking

Custom credit services

Insurance advice

* Some of the services listed above are offered in collaboration with TD Specialists.

We’re here for you

Our practice is founded on personal client relationships based on trust, integrity and shared purpose. We believe your strategy should be dynamic enough to evolve as your circumstances change (they always do!) and enduring enough to persist through generations.

The work we do is people-driven and goes far beyond investment decisions and stock selection.

We believe that successful wealth management is rooted in personal values.

Remo Cardone, CIM® FCSI®

Senior Portfolio Manager & Senior Investment Advisor

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Remo is the founder and lead advisor of the Cardone Wealth Management Group. With more than 25 years of experience in financial services, he and his team strive to serve the needs of affluent families with the highest standards of integrity and transparency. Drawing on the support of the broader TD Wealth team, Remo acts as a Family CFO, helping to simplify the complexities of his clients' financial lives. Remo graduated from the University of Calgary and holds the following designations: Fellow of the Canadian Securities Institute (FCSC®), Certified Investment Manager (CIM®) and Certified Financial Planner (CFP®).In today's fast-paced world, Remo believes in ongoing professional development and continues to complete professional courses offered by the Canadian Securities Institute. He is well-positioned to understand the unique needs of high-net-worth families and is committed to building long-term relationships based on trust and exceptional client service.

Outside of the office, Remo enjoys spending time with his wife and three children, hiking in the mountains, biking, and fly-fishing. An active and engaged member of his local community, Remo has coached football and hockey for over 25 years, and has volunteered with the Canadian Cancer Society.

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Our team-based approach is distinguished by consistency, longevity and a commitment to service excellence.


Better decisions for a better future
Let's start creating your roadmap to the future you envision. Give us a call to schedule a meeting and find out how our team can help you and your family.
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Over the past 155+ years, TD has helped generations of clients with their personal, family and business assets in the ways that matter to them. TD has done this by building strong, transparent relationships and creating integrated, tailored solutions to help people reach their financial goals.

We look forward to discovering what truly matters to you.