Meet the team

We are an established wealth advisory and investment management practice with more than 30 years of experience, entrusted to advise on over $3 Billion* in client assets. Our team delivers highly customized, institutional quality investment management and sophisticated wealth planning, supported by deep expertise in portfolio construction and engaging TD specialists to assist with tax efficient structuring, and estate and succession planning.

Serving entrepreneurs, families, and mid market institutional clients, we intentionally maintain a select client base with investable assets of $10 million or more to provide disrection, continuity of advice, and exceptional depth of service.

Rod McInnes

Senior Investment Advisor

Rod is a senior member of a sophisticated wealth advisory practice defined by disciplined investment management, thoughtful advice, and an unwavering focus on client objectives. He works with high net worth families, entrepreneurs, corporations, charitable organizations, and select TD executives, delivering highly customized, institutional-quality investment strategies through a clear and pragmatic approach.

Rod brings an experienced and steady hand to guiding portfolio strategy, complex wealth planning, and long-term stewardship for clients with multigenerational and corporate needs. The collective depth and scale of the practice provides clients access to unique opportunities across North American capital markets, alongside comprehensive guidance on sophisticated financial planning matters.

Rod began his career as an Investment Advisor with TD Evergreen (now TD Direct Investing) in 1998, drawing on prior experience at Imperial Oil. His client-first mindset and leadership led to dual roles as Branch Manager and Investment Advisor before he chose to focus exclusively on wealth management and joined the King & Bay Private Client Center to serve some of the bank's most prominent clients.

Rod has built a family office–style practice grounded in discretion, long-term stewardship, and a meaningful client experience. He holds an undergraduate degree from the University of Western Ontario.

Jonathan Freeman CFA®, MBA

Associate Portfolio Manager
Senior Investment Advisor

Jonathan brings institutional investment experience and a rigorous, analytical perspective to portfolio management and client advice. He supports the team's investment strategy with a focus on macroeconomic analysis, asset allocation, and risk aware portfolio construction, integrating this discipline with a practical understanding of corporate and personal tax structures to help clients consider tax implications in their wealth plan.

In his role, Jonathan contributes to security selection, portfolio implementation, and ongoing investment oversight, while also working closely with clients to steward both straightforward and complex Wealth Planning needs. This includes coordinating tax efficient structuring, cash flow planning, and longer term wealth considerations across families and corporate entities. He helps translate institutional quality insights into tailored client outcomes, bridging sophisticated investment strategy with practical, real world execution.

Prior to joining the team, Jonathan spent nearly a decade at TD in progressively senior roles, most recently at TD Securities Inc., where he traded a rotating range of asset classes and advised pension plans, central banks, and large asset managers on market trends, trade ideas, and execution. Earlier, he worked at TD Asset Management, providing market outlook commentary and investment strategy advice alongside leading portfolio managers and analysts.

Jonathan holds an MBA from the Rotman School of Management at the University of Toronto, specializing in Risk Management and Financial Engineering. He is a CFA® charterholder, licensed in options and derivatives, and holds an undergraduate degree from the University of Western Ontario.

*as at May 2026

TD Wealth

Our Team

Benjamin Wong

Associate Investment Advisor

Benjamin brings a disciplined, client first approach to supporting ultra high net worth families. He plays a key role in delivering a seamless, high touch client experience through precise execution and proactive service.

As a primary contact for day to day operations, Benjamin specializes in market related trade execution, registered plan administration, and coordination with institutional portfolio managers to align portfolio construction with client objectives.

Benjamin began his career with TD Wealth Financial Planning in 2017 before transitioning into retail banking, where he developed deep insight into TD's platforms and processes. In 2020, he returned to TD Wealth Private Investment Advice, where he delivers highly personalized, white glove service.

Fluent in Cantonese, Benjamin is a graduate of the University of Waterloo. He completed the Investment Advisor Training Program in 2023 and is a CFA® Program candidate, having completed Level I and currently pursuing Level II.

Nadia D'Amario

Client Service Associate

Nadia is a cornerstone of the team's operational strength and commitment to client service excellence, bringing over three decades of experience in the investment industry. She is known for her professionalism, attention to detail, and deep institutional knowledge.

Nadia supports all aspects of the client relationship, providing accuracy, efficiency, and continuity across complex service and operational needs. Her proactive approach to understanding client needs helps support a positive client experience.

She joined TD in 1994 with TD Evergreen (now TD Direct Investing) after earning a degree in Business Administration and Management and has worked exclusively with Rod McInnes since 2000. Her tenure has been instrumental in the growth and evolution of one of the firm's most sophisticated advisory practices.

Charlie Digalakis CFA®, MFin

Client Relationship Associate

Charlie contributes institutional caliber insight and analytical depth to the team's investment process. His experience spans asset allocation, security selection, and market analysis across multiple asset classes.

In his role, Charlie supports investment strategy development and translates institutional quality research into thoughtful portfolio outcomes for clients. He works closely with the advisory team to ensure alignment between strategy, implementation, and client objectives.

Prior to joining the team in 2025, Charlie spent nearly a decade in the Canadian asset management industry. He began his career in institutional sales at one of the world's largest asset managers, working with corporate pension plans and endowments, and later served as a senior product strategist at a leading Canadian fund manager.

Charlie is a CFA® charterholder, licensed in options and derivatives, holds a double degree in Business Administration and Financial Mathematics from Wilfrid Laurier University, and earned a Master of Finance from Queen's Smith School of Business.

Sumayyah Khawaja

Client Service Associate

Sumayyah is a highly organized and detail-oriented professional who brings precision and a strong service mindset to assisting high-net-worth clients and the advisors she works alongside. She is dedicated to delivering consistent, reliable support across the practice.

Her responsibilities include opening both personal and complex investment accounts, managing documentation, processing trades and transfers, and coordinating daily client and internal priorities.

Sumayyah began her career at TD as an EasyLine Customer Service Representative, developing the ability to perform accurately in fast paced, high-pressure environment. She holds an Honours degree in English Literature from the University of Toronto Scarborough and is fluent in Urdu and Punjabi.

In recognition of her exceptional contributions and commitment to excellence, Sumayyah was awarded the Annual STAR Award in 2025.

Andrew Nikolaou

Client Service Associate

Andrew provides reliable, client focused support across portfolio implementation and administrative execution. He is recognized for his consistency, professionalism, and attention to detail.

In his role, Andrew supports trading activity, account openings, and asset transfers, helping provide efficient execution and a seamless client experience.

Andrew began his career with TD Canada Trust in 2017 before transitioning to TD Wealth Private Banking in 2022. His contributions have been recognized with two Quarterly Star Award Years as - 2023 and 2024. He holds a Bachelor of Commerce from Toronto Metropolitan University's Ted Rogers School of Management, graduating with distinction.

Sameen Azad

Client Service Associate

Sameen brings a global perspective and a relationship driven mindset to client service. His approach is informed by academic and lived experience across three continents.

He supports day to day client service and operational execution, helping provide responsive and thoughtful service delivery for high net worth individuals and families.

Sameen began his career at the flagship Toronto Yorkville TD branch, where he built a strong reputation for delivering personalized advice and an exceptional client experience. He holds a Bachelor of Commerce (Honours) from the Ted Rogers School of Management at Toronto Metropolitan University and is actively pursuing advanced industry certifications.

TD specialists

Charley Tsai LL.B., CFP®, TEP

Senior Manager,
High Net Worth Planner, TD Wealth

Charley specializes in helping to develop comprehensive wealth plans that incorporate various wealth considerations (i.e., retirement, tax, estate planning, risk management, and philanthropy). Charley works closely together with our team, other internal specialists, as well as the client's professional advisors to ensure that the implementation of any financial decision is coordinated and integrated.

Charley graduated with a degree in Mechanical Engineering from the University of Waterloo in 1990 and obtained his law degree from the University of Ottawa in 1993. In 2002, Charley completed the in-depth tax study program with the Canadian Institute of Chartered Accountants. In addition, he holds the Certified Financial Planner (CFP®), Chartered Life Underwriter (CLU®) and the Trust and Estate Practitioner (TEP) designations, and is a member of the Canadian Bar Association and the Canadian Tax Foundation.

Ian Lebane LL.B., LL.M., TEP

Tax and Estate Planner, TD Wealth

Ian has been a member of the Ontario Bar since 1990 and was in private practice focusing on estate planning and taxation until 1994, when he achieved his Masters of Law in Taxation. From 1994 to 2006, Ian held various positions with the Law Society of Upper Canada related to lawyer training and accreditation in estates, trusts, and taxation. He will apply his 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.

Aleem Nuruddin Janmohamed CPA, CA

Estate Planning Advisor,
TD Wealth Insurance Services

Aleem holds the Chartered Accountant, Chartered Financial Analyst® (CFA®) and Chartered Professional Accountant designations. He holds an Honours Bachelor of Arts in Accounting and a Master's of Accounting from the University of Waterloo. With 20 years of experience in financial services, Aleem will work with you to help you determine the form of coverage for 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 your tax obligations.

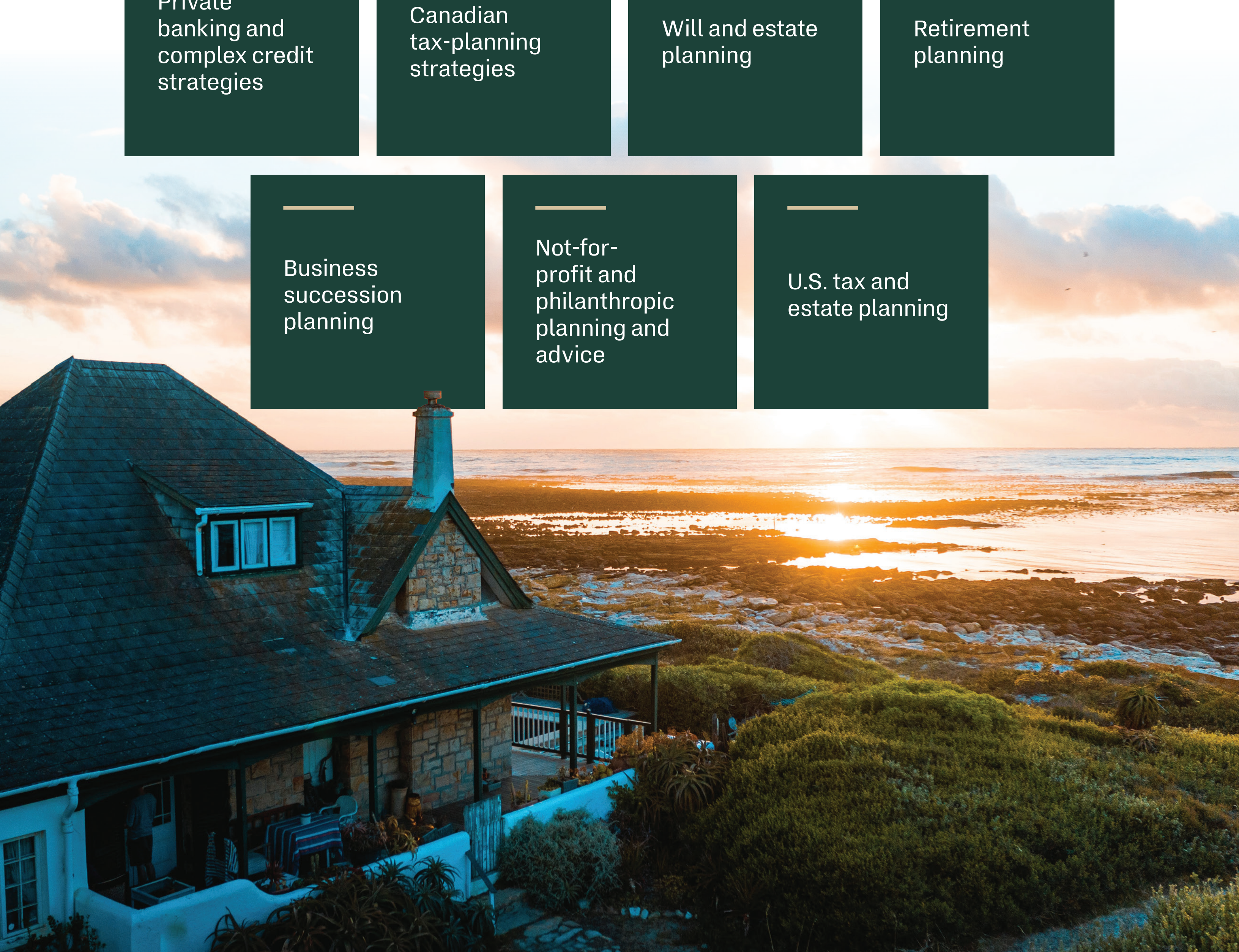
Wealth Advisory Services team

An extensive network to help get you where you need to go

With a dedicated team of TD specialists at our fingertips, we can help develop practical solutions in response to a variety of financial challenges. From helping ensure you're able to take advantage of specific tax benefits to uncovering which wealth transfer strategies will work best for your unique situation, we work hard to help educate and support you so that you can make informed decisions when it counts most.

No matter what stage your business is currently, we have the resources to help. We can connect you with TD specialists who can assist in a variety of topics including:

- Private banking and complex credit strategies
- Canadian tax-planning strategies
- Will and estate planning
- Retirement planning
- Business succession planning
- Not-for-profit and philanthropic planning and advice
- U.S. tax and estate planning



TD Wealth Private Investment Advice

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