Jonathan Freeman

Associate Portfolio Manager & Senior Investment Advisor, CFA, MBA, CIM®

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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.