Your interests first

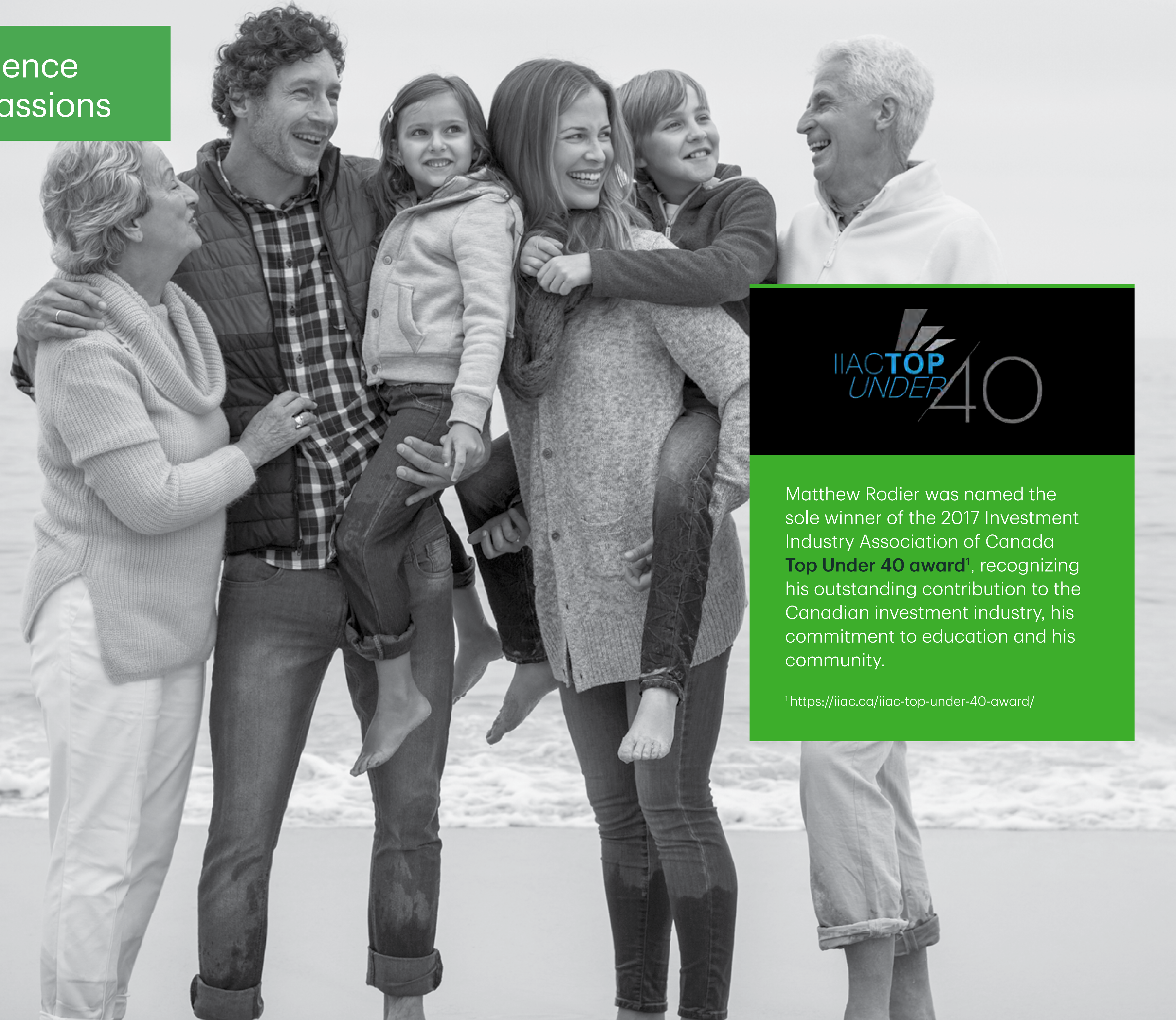
Rodier Asset Management

Let our pursuit of excellence help you pursue your passions

Your financial ecosystem

We work with you to create an integrated group of strategies that incorporates cash flow, investment solutions, and tax and estate planning — all working together to achieve one goal — yours.

Recognizing that your situation can be unpredictable, we strive to build a customized ecosystem that can evolve with you over time.



Matthew Rodier was named the sole winner of the 2017 Investment Industry Association of Canada **Top Under 40 award**[1], recognizing his outstanding contribution to the Canadian investment industry, his commitment to education and his community.

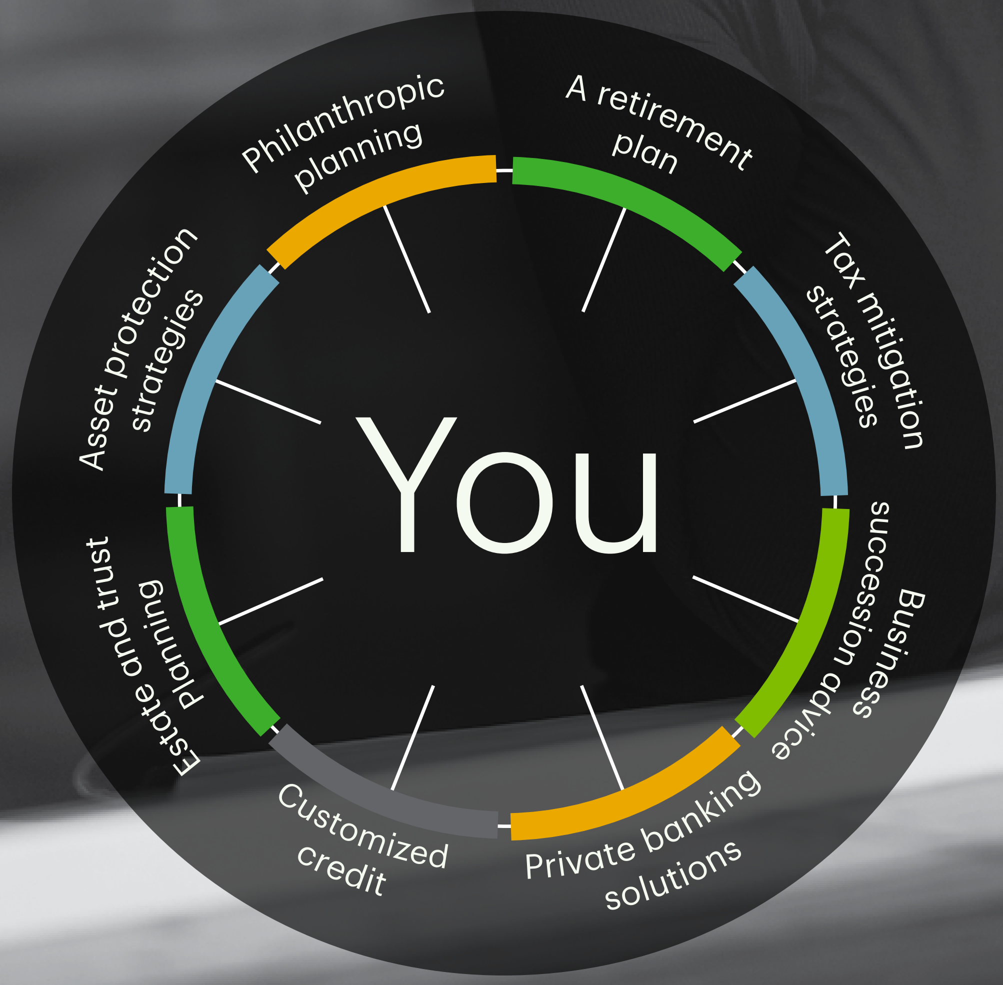
[1] https://iiac.ca/iiac-top-under-40-award/

You are more than your portfolio

Our clients are individuals, families and organizations with considerable assets that are looking for help making sense of it all — throughout all of life's stages.

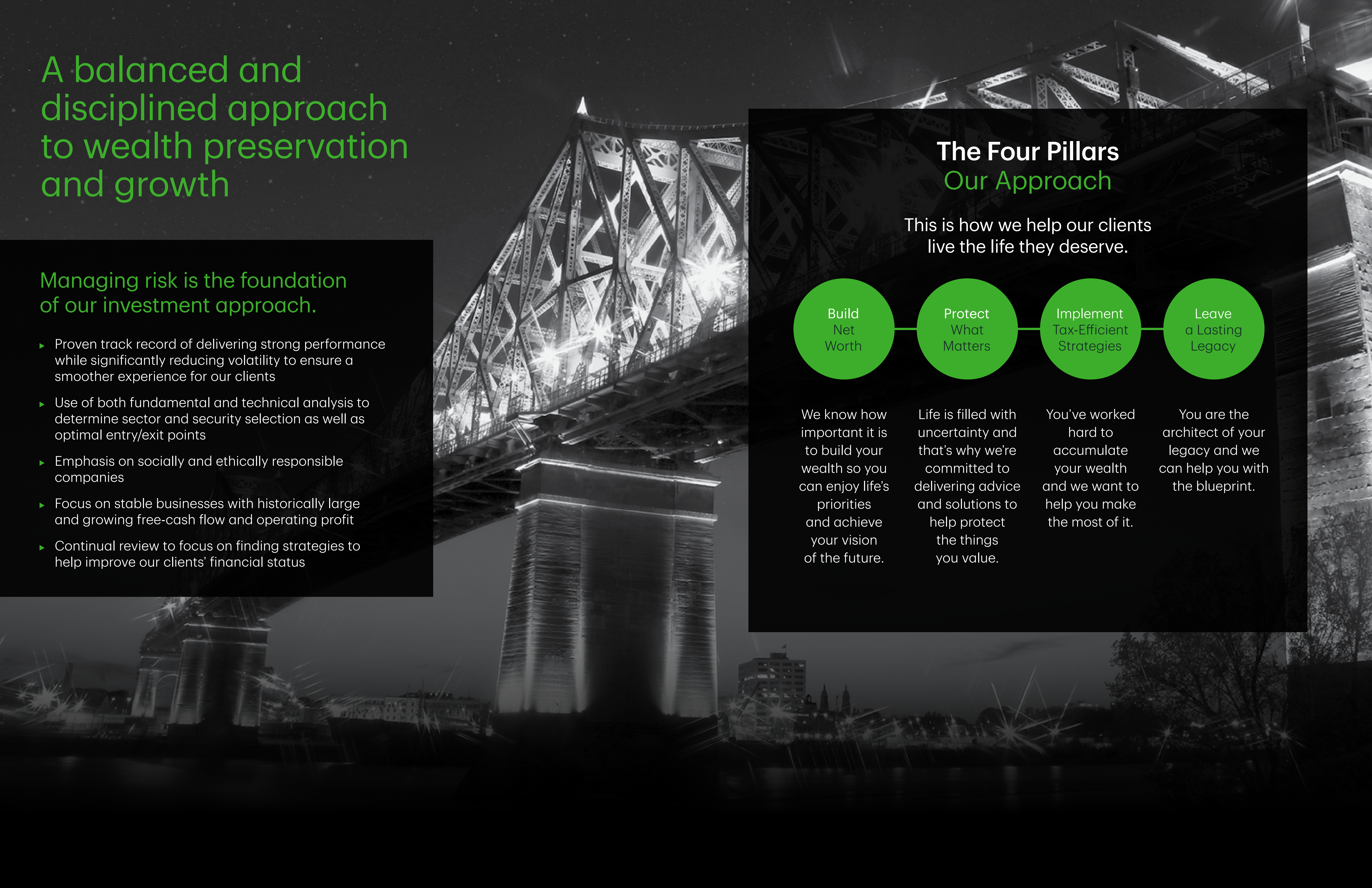
- Working professionals
- Business owners
- Retirees
- Families managing a complex inheritance

Our award-winning team and TD specialists can help you enjoy your wealth by implementing appropriate strategies to secure and improve your financial confidence in every stage.



We are driven by one central goal: to deliver the best possible wealth management experience to you.

Create a legacy	TD specialists can review your notarial documents and help simplify your estate plan with insights and expert advice.
Make a difference in your community	Make a permanent impact on the organizations that mean the most to you by setting up a private foundation to establish a gift that keeps on giving. Or make a difference in your community by creating a tax-advantaged charitable giving plan.
Bank efficiently	Private Banking solutions can provide you with discrete, efficient service for your time-sensitive banking needs.
Manage an estate with care	Trusted advice from our experienced colleagues at TD Wealth Private Trust can help ease the burden of settling an estate after your family loses a loved one.
Cross the border with confidence	For those who travel and/or work in the U.S., we can engage our TD specialists to help you establish convenient cross-border banking solutions.
Care for disabled loved ones	We can help ensure your disabled family members are cared for now and in the future, with dedicated planning.



A balanced and disciplined approach to wealth preservation and growth

Managing risk is the foundation of our investment approach.

- Proven track record of delivering strong performance while significantly reducing volatility to ensure a smoother experience for our clients
- Use of both fundamental and technical analysis to determine sector and security selection as well as optimal entry/exit points
- Emphasis on socially and ethically responsible companies
- Focus on stable businesses with historically large and growing free-cash flow and operating profit
- Continual review to focus on finding strategies to help improve our clients' financial status

The Four Pillars
Our Approach

This is how we help our clients live the life they deserve.

Build Net Worth

We know how important it is to build your wealth so you can enjoy life's priorities and achieve your vision of the future.

Protect 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.

Implement Tax-Efficient Strategies

You've worked hard to accumulate your wealth and we want to help you make the most of it.

Leave a Lasting Legacy

You are the architect of your legacy and we can help you with the blueprint.

Surround yourself with our team and TD specialists who are committed to excellence

Investment Team

Matthew Rodier, B. Comm., CIM®, FCSI®

Vice President, Portfolio Manager,
Certified Retirement Specialist

Matthew has over 15 years' experience in the investment industry. He was named the 2017 recipient of the IIAC Top Under 40 Award, which recognizes and celebrates Canada's new generation of highly motivated and talented young professionals whose drive, dedication, qualities and accomplishments have brought distinction to the investment/financial industry.

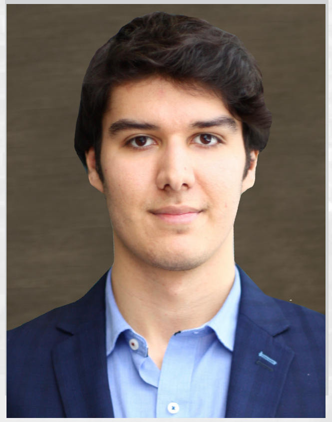
Matthew is equally committed to his clients as he is to his community. An active supporter of the Just for Kids Foundation, he co-chairs its annual golf and cycling events, which raise money for the Montreal Children's Hospital. When not at the office, Matthew loves spending time with his wife and three children.

Julie Liu

Client Service Associate

Julie has been with TD since 1989 and has a broad knowledge of the brokerage and retail divisions. She is renowned for her exceptional customer service and strict attention to detail, as well as her contagious sense of humor.

Julie appreciates traveling, experiencing new cuisine, and sharing a good laugh.



Adrien Khendek

Client Service Associate

Before arriving at TD Wealth, Adrien worked at a sales distribution firm focusing on offering investment products to financial professionals. During that time, he gained a strong knowledge of the investment world and learned the value of establishing and maintaining strong relationships with clients.

Adrien majored in finance at the John Molson School of Business and has completed Level 1 of the CFA.

On a personal note, Adrien enjoys soccer, basketball, hockey, and skiing. He loves to travel and is always looking for new adventures.

TD Specialists

Nicole Assee, CPA, CGA, F.Pl

Wealth Planning

Nicole holds a Chartered Professional Accountant and Certified Financial Planner (F.Pl.). She provides advanced financial, tax, and estate planning assistance to high net worth clients. She has over 25 years of experience in the fields of wealth management, accounting and finance. Her knowledge and experience allow her to create comprehensive wealth plans to help clients achieve their various goals and optimize their situation.

Teresa Malowany, CPA, CA, F.Pl.

Wealth Planning

Teresa provides advanced financial, tax, estate and business succession planning assistance to owner/managers and high-net-worth families. She creates integrated and customized wealth plans to help clients identify and reach specific goals. Teresa has more than 20 years of experience in the fields of tax, accounting and financial planning.

François Desmarais, M.Tax., F.Pl., TEP

Will and Estate Planning

Francois is a Tax and Estate Planner with over 25 years of experience. His goal is to provide his clients confidence by proposing integrated solutions to optimize the transfer of wealth to the next generation. Francois, a notary who holds a Certified Financial Planner (F.Pl.) and a Master's Degree in Taxation.

Annie Boivin, F.Pl., D.Tax, TEP

Business Succession Planning

Annie is a Tax and Estate Planning Specialist with over 25 years of experience. She is focused on helping individuals and business owners implement effective tax, estate and succession plans. Outside TD, Annie is a columnist for Les Affaires Plus magazine as well as Finances et Investissement and she has co-authored a book called Ma retraite. She is often quoted in the press on matters related to tax, estate and financial planning strategies.

Patrick Absi, LL.B., CLU, F.Pl.

Insurance Solutions

As a Financial Security Advisor, Patrick has over 25 years of experience, in the life insurance industry. Working closely with your advisor, Patrick employs a comprehensive process to assess your wealth management needs and then recommends creative, tax-exempt insurance strategies to help address them.

We're discretionary for a reason

Genuine stewardship of your wealth

The value of working with an advisor is hard to calculate. Beyond the gains you may make in your investment portfolio are the gains you can make in your overall financial health and well being. We charge a single fee for which you receive industry-leading advice from a team of experienced professionals covering many different aspects of wealth and financial matters. In essence, we act like your personal CFO.

Throughout the course of our long-term relationship we will work hand in hand with you to organize the various aspects of your financial life into a well-functioning financial ecosystem with your evolving goals and objectives at the centre.

It's important to us that you understand where you are going and how you are getting there, and we will take the time to explain in plain language our methods, our philosophy and anything else you wish to talk about. We leave the jargon at the door!

Uncover opportunity and achieve your potential

Contact us today to learn more about our honest, straightforward approach.

1350 Rene-Levesque West
9th Floor, Montreal, QC H3G 1T4

rodierassetmanagement.com

Office (514) 289-0358
Email matthew.rodier@td.com

IIAC TOP UNDER 40

Over the past 155+ years, TD Bank Group has helped generations of clients with their personal, family and business assets in the ways that matter to them. They have done this by building strong, transparent relationships and creating integrated, tailored solutions to help clients reach their financial goals.

We look forward to discovering what truly matters to you.

rodierassetmanagement.com