TD Wealth

Helping you make the most of your success.

Sager Fingland | Wealth Management


Michael Shoniker, Dawn Guillemette, Blair Fingland, Heidi Yandt, Robert Sager, Tina Chatter.

Helping you make the most of your success

At Sager Fingland, we know that your wealth management needs are unique and sophisticated. As your trusted advisors, we take the time to fully understand your circumstances before crafting a comprehensive wealth strategy to help you achieve the financial future you envision.

Most importantly, we work hard to establish and maintain trust knowing that a strong long-term relationship is the key to helping you achieve your goals.

Bringing your financial goals to life

Our team-based investment process is built on experience, knowledge and transparency. We offer what we believe to be best in class investment solutions tailored to your unique goals.

Your best interests will guide each of our decisions, from finding tax advantages to implementing income strategies to ensuring your estate planning needs are taken care of. We approach every relationship with the utmost care and discretion – knowing that we are helping you build and protect your wealth for generations to come.

Big-picture wealth planning.

We work to achieve what's important to you using the assets you've accumulated. We provide clarity by building a financial roadmap that clearly outlines where you are today, where you need to be and how we aim to get you there.

Along with our TD Specialists, we offer...

- Estate planning, will and intergenerational wealth planning
- Retirement planning
- Educational-fund planning
- Business succession planning
- Tax planning advice
- Private banking
- Philanthropic advice and planning

Process driven, proven results

1
Deep discovery
of your goals, objectives, circumstances and risk tolerance to set everything in motion.

2
Complete wealth planning
based upon our deep discovery of you and your family.

3
Asset allocation and portfolio creation
with an integrated approach.

You

4
We look at everything through a tax lens.
We consider the tax implications of our strategies upon your wealth, now and in the future.

5
Service with care.
Our interactions are authentic, personal and based on your unique circumstances.

6
Continual review and response.
We constantly revisit your wealth plan, measuring against important checkpoints and implement changes as your life and objectives evolve.

Why invest with us?

Strength and continuity.

As one of the largest teams in Southwestern Ontario, we manage almost three quarters of a billion dollars in client assets. Our team based approach emphasizes honesty and experience. You and your family can expect long-term service and continuity for generations to come.

Integrity & accessibility.

Our relationships are built on trust, transparency and candid communication. A deep discovery process tells us what is important to you and what keeps you up at night. We believe that wealth management is more than managing money and we're here to help you with your financial planning needs- big or small.

Confidence and care.

We want our clients to enjoy life, knowing that their assets- and their financial future- are in good hands.

Meet our team

Robert Sager, CFP®, CIM®, FMA, B. Econ. (Hons)

Vice President, Investment Advisor

Robert Sager has been in the wealth management business for nearly two decades. He has an Honours Degree in Economics from Wilfrid Laurier University and holds the Certified Financial Planner (CFP®) and Chartered Investment Manager (CIM®) designations.

Rob works closely with Blair Fingland, leading the team and building prudent, tax-efficient portfolios for high-net-worth families and individuals. His analytical and technical skills resonate well with business owners, professionals and complex, intergenerational families. Rob also works with Heidi Yandt on broad-based wealth planning strategies to help clients achieve their estate-planning goals and minimize their tax liabilities.

Rob lives in the Kitchener-Waterloo area with his wife Erika and their three young sons. As a family, they love to travel and enjoy an active lifestyle in the community.

D. Blair Fingland, B. Econ, CFP®

Vice President and Investment Advisor

Blair Fingland has been in the wealth management business for more than two decades. He holds a degree from Wilfrid Laurier University and holds the Certified Financial Planner (CFP®) designation.

Blair works closely with Robert Sager, leading the team and building prudent, tax-efficient portfolios for high-net-worth families and individuals. Blair primarily handles wealth management for affluent business owners who require sophisticated, best-in-class investment strategies. Blair also works with Heidi Yandt to provide holistic wealth planning to help clients find tax advantages, meet their retirement and estate-planning goals and ensure access to private and commercial banking services.

Blair believes in the power of team sports for youth and has been a long-time volunteer for both Waterloo Minor Hockey and Waterloo Minor Baseball. He lives in the KW region and is a golf enthusiast.

Sager Fingland Wealth Management

Meet our team

Heidi Yandt, CFP®

Investment Advisor

Heidi Yandt began her career with TD in 2006 and has been providing financial advice to investors in the Kitchener-Waterloo area for more than a decade. She has completed a three-year diploma in Financial Planning and holds the Certified Financial Planner (CFP®) designation.

Drawing on her extensive experience in wealth planning, Heidi is warm and approachable. She builds and maintains strong client relationships based on trust, transparency and clear communication. She works with Robert Sager and Blair Fingland to create customized, comprehensive wealth strategies to help clients fulfill their unique financial vision.

Heidi lives in KW with her husband Nathan and together they enjoy a busy, active lifestyle. Born and raised in the area, Heidi maintains deep ties to the local community.

Michael Shoniker, B. Econ. (Hons)

Associate Investment Advisor

Dawn Guillemette

Client Service Associate

Tina Chater

Client Service Associate

Contact us.

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