



Vicky Liu

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A letter from Vicky Liu:

Investing is a lifelong journey. Every story of yours matters to me.

Throughout my career in the financial field, I've seen individuals navigate significant market downturns that impacted their retirement savings, as well as major life transitions that brought both emotional challenges and financial strain. If you asked me why I decided to become an Investment Advisor, the answer is simple - with all my experience, expertise, network and most importantly my understanding of people's unique values and goals, I want to stand by each of my clients as they embark upon their unique financial journeys. I want to ensure they are never alone and are always provided with care.

As I always start my client relationship by listening to your story, here is a bit of mine:

I graduated from the University of Toronto with a Bachelor of Business Administration degree. I hold both the Chartered Financial Analyst (CFA®), and the Chartered Professional Accountant (CPA) designations. In 2011, I began my career in the financial services industry in Toronto. Since then, I've enjoyed every moment working in this fast-paced yet inspiring industry.

As an Associate Portfolio Manager and Senior Investment Advisor at TD Wealth Private Investment Advice, I provide highly personalized investment strategies tailored to each client's unique objectives. I construct customized portfolios across equities, fixed income, and alternative investments within an open architecture platform, allowing for broad diversification across asset classes. Where appropriate, I incorporate risk management and hedging strategies designed to help mitigate volatility and preserve long-term capital. Working with TD specialists, I also provide wealth management services, including long term retirement planning, efficient tax strategies, and multi-generation estate planning strategies. My goal is to ensure that every aspect of a client's financial life is aligned, intentional, and forward-looking.

Outside of work, I enjoy an active and adventurous lifestyle - boxing, scuba diving and playing the drums keep me energized. I also treasure spending time with my family, whether exploring the outdoors or just sharing everyday moments with them. Seeing my daughter's smile is a daily reminder of what truly matters.