



# Size Yee Ling

LLB, CFP®

## Investment Advisor

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A letter from Size Yee Ling:

I believe investing is never just about numbers — it's about people, families, and the legacies they hope to build.

Early in my career as a tax litigator and planner at a Toronto law firm, I worked closely with high and ultra-high net worth families navigating complex tax and legal challenges. What I came to understand quickly was this: behind every structure, every corporate reorganization, every trust document, there was a family story — with real hopes, tensions, obligations, and long-term aspirations.

If you asked me why I transitioned from law into investment advisory, the answer is simple. I wanted to move from solving isolated legal problems to guiding the bigger financial picture. I wanted to stand beside families not only in moments of complexity, but throughout the full arc of their financial lives.

I earned my Juris Doctor from the University of Toronto and built my foundation in tax litigation and planning. Today, as an Investment Advisor at TD Wealth Private Investment Advice, I integrate my past experiences and tax expertise into a comprehensive advisory practice dedicated to high-net-worth families - whether their lives are centred in Canada or span multiple jurisdictions. I design customized portfolios using tax-efficient strategies to optimize after-tax returns and help preserve generational wealth. My approach is grounded in discipline and an attention to detail — but equally important is ensuring that every decision reflects your family's values, long-term goals, and vision for the future. True financial stewardship, in my view, is collaborative. I work closely with family members, trustees, and other professional advisors to simplify complex concepts, educate the next generation, and build lasting confidence. Whether navigating market volatility, structuring a reorganization, or planning a legacy, my role is not simply to advise — but to advocate.

Outside of work, I value time spent recharging and staying active. I am fortunate to build a life alongside my loving wife and to raise our two sons together. They remind me every day of what truly matters – time, presence, and building something meaningful together.