

TD Wealth

TD Privately Managed Portfolios



A personal relationship with
your Portfolio Manager





Devote your time to what's important to you, knowing that your investments are being managed by a professional you trust who truly understands your financial goals.

Managed investment solutions

Spend your time on what matters

If you prefer to spend time enjoying your life and having a professional you trust manage your investments, then TD Wealth Private Investment Advice could be the answer. When you choose one of our managed solutions – including TD Privately Managed Portfolios – you can put your investments in the hands of specialists and enjoy –

- A long-term, one-on-one relationship with your Investment Advisor
- The freedom of delegating day-to-day investment decisions about your portfolios

At TD Wealth Private Investment Advice, we're committed to understanding your financial needs and providing you with a customized strategy and investment solutions through every stage of your life. Discover all the benefits we can offer you through TD Privately Managed Portfolios.

TD Privately Managed Portfolios

A Portfolio Manager who understands you

When it comes to creating an investment portfolio that's right for you, the solution should be designed by a person who understands your individual financial needs and goals.

That's exactly what TD Privately Managed Portfolios offer you.

With TD Privately Managed Portfolios, your Investment Advisor is also your Portfolio Manager, responsible for building and managing your investment portfolio, as well as making all the day-to-day investment decisions.

With TD Privately Managed Portfolios, you benefit from –

- **A personalized portfolio** – Your Portfolio Manager will sit down with you to understand your financial goals, create a personal profile and put together a customized investment strategy designed to help you meet your goals
- **Direct access** – You have direct access to your Portfolio Manager, which gives you the opportunity to shape the strategy behind the investment decisions being made for you

A one-on-one relationship with your Portfolio Manager

When you invest in TD Privately Managed Portfolios, everything begins with the one-on-one relationship you form with your Portfolio Manager.

Your Portfolio Manager is a dedicated professional who will listen to your needs and work with you to develop a customized investment strategy that's right for the goals you have set.

Your Portfolio Manager will –

- Understand your financial circumstances
- Develop a personal Investment Policy Statement to summarize and document your investment goals
- Implement investment policies and strategies to help you meet those goals
- Measure and monitor your portfolio on an ongoing basis
- Rebalance your portfolio as necessary
- Keep you informed of your progress toward your financial goals

TD Privately Managed Portfolios

A qualified professional working directly with you

TD Wealth Private Investment Advice Portfolio Managers are held to high standards. They must not only hold industry-specific credentials, but also meet our stringent qualifications.

In order to work as a Portfolio Manager, your Investment Advisor must have achieved –

- At least five years of service as a licensed Investment Advisor and be registered with the Investment Industry Regulatory Organization of Canada (IIROC)
- The Canadian Investment Manager (CIM), Chartered Investment Manager (CIM®), or Chartered Financial Analyst (CFA) designation. These are the gold standards for Portfolio Management in the Canadian financial services industry
- A proven track record that demonstrates the skills, discipline and experience required to meet the high standards set by TD Wealth Private Investment Advice

In managing your investments, your Portfolio Manager has access to a broad range of research and resources through TD.

TD is committed to supporting the success of our Portfolio Managers. We conduct ongoing monitoring to make sure you are receiving a high level of service and professional investment management. As part of this process, our Portfolio Management Review Committee oversees the Portfolio Managers and TD Privately Managed Portfolios.

TD Wealth Private Investment Advice

The benefits of investing with us

When you choose TD Privately Managed Portfolios, you get a one-on-one relationship with a Portfolio Manager who understands you and your goals.

In addition, working with your Portfolio Manager, you also benefit from –

- **The freedom to enjoy life** – A specialist you trust is managing your investments, which means instead of being involved in each transaction, you can focus on what's important to you
- **The ability to manage taxes** – You own your securities directly, which may give you the flexibility to develop and pursue an effective tax-planning strategy
- **Comprehensive reporting** – Monthly statements, quarterly performance reports and year-end reports are sent directly to you to help ensure that you know how your investments are tracking to your goals
- **One inclusive management fee covers the benefits of TD Privately Managed Portfolios** – The management fees you pay on a non-registered plan may also qualify as a tax deduction. Talk to your tax advisor about your specific situation



If you're ready to make the most of your time and delegate the day-to-day management of your investments to a specialist you trust, then TD Privately Managed Portfolios could be right for you.

**Discover the benefits of a one-on-one relationship
with a Portfolio Manager.**

**Talk to your Investment Advisor today
about investing in TD Privately Managed Portfolios.**

