TD Wealth

The Investment Strength Report™

Get a clear, personalized overview of your portfolio's strengths and weaknesses.

Rickerby
Wealth Group

Unpacking Your Investment Strategy

As your investment portfolio becomes more complex over time, it can be difficult to see what's really generating growth, and which aspects are ultimately working against you.

The Investment Strength Report™ is a professional review of your investments that presents the strengths and weaknesses of your portfolio within a single, clear report. For many, this process identifies duplicated holdings, unnecessary costs and other redundancies that may limit your potential for growth.

See what's really happening in your portfolio and benefit from actionable steps toward a stronger, more effective investment strategy.

What You Get

The Investment Strength Report™ allows you to get a better understanding of the various components of your portfolio, from asset allocation to risk exposure, so that you can see at a glance whether or not your current strategy is aligned with your financial goals.

Through a clear report and personalized recommendations delivered through one-to-one discussion, you can easily identify what's needed to simplify your portfolio and to help you to maximize investment growth.

Analytic categories include:

- Annualized income vs. total management expense
- Asset allocation and over-/underweight analysis
- Diversity and exposure to international markets
- Opportunities to improve tax efficiency
- Security duplication across funds
- Bond maturation dates and investment timeline
- Benchmark-relative performance and risk-return analysis
- Fund ratings and review of investment quality

The Process: Investment Strength Report™

With 31 years' experience in the industry and 13 years as a Portfolio Manager, Shaun Rickerby will personally review your portfolio of holdings and provide an executive summary with recommended next steps, in addition to your investment report.

STEP 1: **Strength Review**
We initiate a review of your investments and holdings, including individual securities, funds and ETFs.

STEP 2: **Synthesis**
We produce a report containing the findings from our assessment in an organized document, along with a summary piece synthesizing the information into practical insights and takeaways.

STEP 3: **Delivery**
You're provided with a hard copy of the report and executive summary, which can be received in the mail or in person, with an optional face-to-face meeting.

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