Smith
Church
Wealth Management

TD Wealth

Always disciplined, never dramatic

At Smith Church Wealth Management, we know that change is inevitable — in both your life and the financial markets. This is why our approach is carefully designed to help you navigate these shifts with confidence. When circumstances change, our strategy is clear so we can act with conviction.

Our **Symmetry Process** is a proven approach that incorporates the many facets of your financial life to help create a seamless, collaborative experience. Together, we hone your vision for the future and then carefully craft a wealth plan that can weather the ups and downs of the market while evolving to meet your changing lifestyle needs. By focusing on preparation rather than predictions, we aim to eliminate emotion from important decisions.

Working with us, you can expect a disciplined team of professionals experienced in the complex needs of high-net-worth families like yours.

An all-weather approach

Over two decades, we've developed and refined our structured framework. We call it the **Symmetry Process** because that's exactly our goal — to help provide symmetry in your financial life through a fine balance of wealth growth and protection.

Whether complex or straightforward, we apply the same rigour to every element of your strategy and its day-to-day execution. The **Symmetry** process is guided by the following principles:

- Balancing risk management with the natural desire for growth
- Eliminating emotion from investment decisions
- Providing comprehensive coverage of client needs

We believe that success in wealth management ultimately hinges on our deep understanding of you and your unique situation. Here's an outline of what you can expect working with us to look like.

Discover

A getting-to-know-you conversation to learn who you are and what is important to you.

Build

The strategic development of a tailored wealth plan and investment strategy that aligns with your goals.

Collaborate

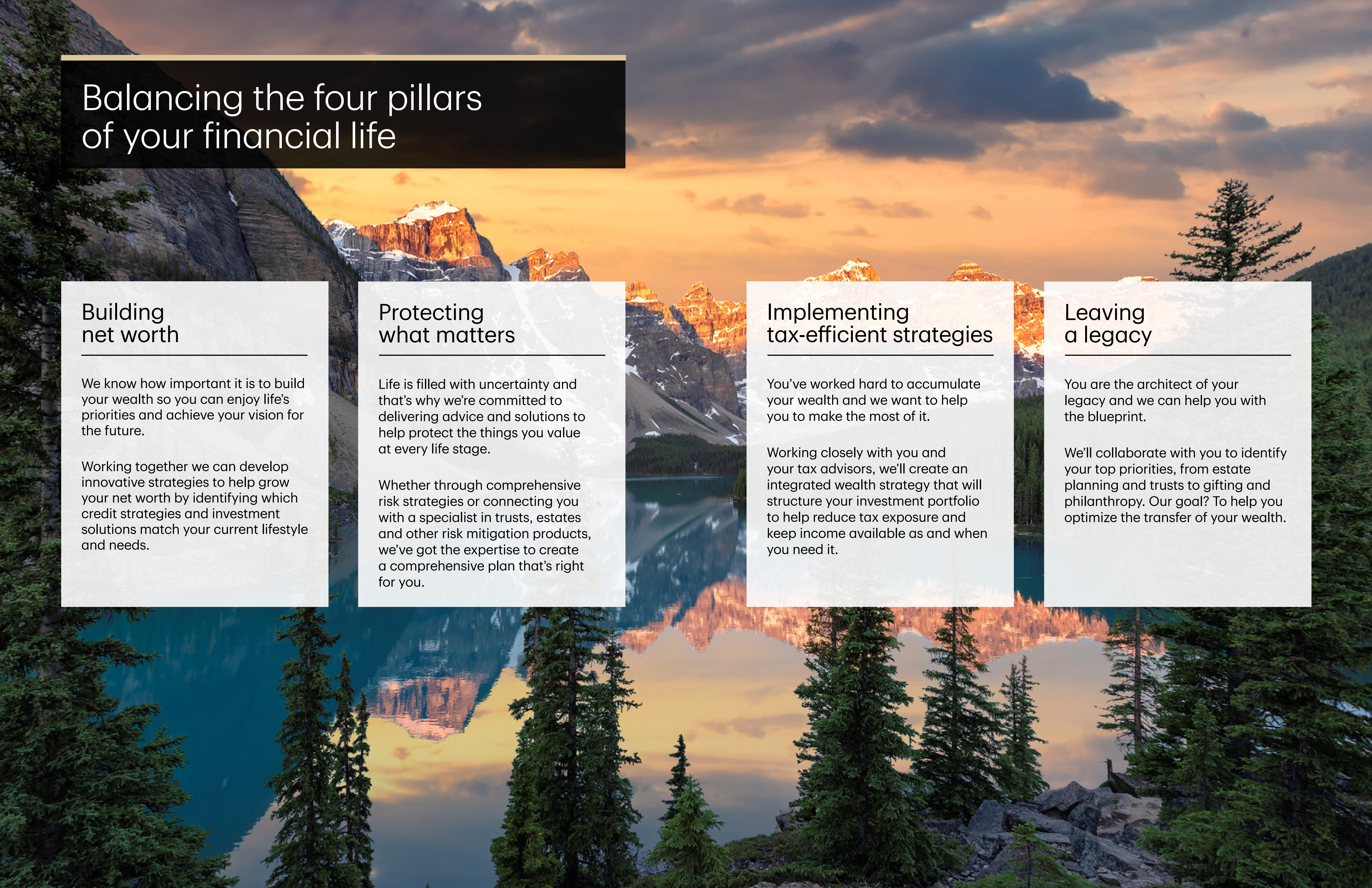
Implementation of your strategy, leveraging the expertise of TD Specialists.

Measure

Ongoing review and optimization of your strategy to identify potential gaps or opportunities.

Communicate

Clear, consistent communication to keep you informed of progress and ongoing discussions about your goals.



Balancing the four pillars of your financial life

Building net worth

We know how important it is to build your wealth so you can enjoy life's priorities and achieve your vision for the future.

Working together we can develop innovative strategies to help grow your net worth by identifying which credit strategies and investment solutions match your current lifestyle and needs.

Protecting what matters

Life is filled with uncertainty and that's why we're committed to delivering advice and solutions to help protect the things you value at every life stage.

Whether through comprehensive risk strategies or connecting you with a specialist in trusts, estates and other risk mitigation products, we've got the expertise to create a comprehensive plan that's right for you.

Implementing tax-efficient strategies

You've worked hard to accumulate your wealth and we want to help you to make the most of it.

Working closely with you and your tax advisors, we'll create an integrated wealth strategy that will structure your investment portfolio to help reduce tax exposure and keep income available as and when you need it.

Leaving a legacy

You are the architect of your legacy and we can help you with the blueprint.

We'll collaborate with you to identify your top priorities, from estate planning and trusts to gifting and philanthropy. Our goal? To help you optimize the transfer of your wealth.

We've got you covered

At Smith Church Wealth Management, we manage more than your investment portfolio. Working with a select team of TD Specialists, we can create a comprehensive, tailored wealth plan that carefully balances the intricacies of your unique financial life.

- **Investment management**
- **Retirement planning**
- **Tax efficiency**
- **Cash-flow management**
- **Asset protection**
- **Education savings**
- **Planning for major purchases**
- **Charitable giving & philanthropy**
- **Business succession**
- **Private banking**
- **Custom credit**
- **Insurance planning**
- **Wealth transfer**
- **Trusts and Wills**

*Some specialized services are provided in collaboration with TD Specialists.

Our risk management commitment

We take a risk-managed approach to everything we do because we are committed to helping bring stability and security to your financial future.

Our investment philosophy is guided by the following principles:

- Tactical diversification is vital
- Risk/return must be thoughtfully balanced
- Portfolios should be insulated during volatile markets
- Looking beyond traditional markets can provide new sources of returns
- The traditional 60/40 portfolio isn't always the best answer

Meet the team

Michael Smith, CIM®
Portfolio Manager,
Investment Advisor
TD Wealth Private Investment Advice

T: 403 299 8663
E: michael.smith@td.com

Michael has been advising high-net-worth clients for more than 25 years, working closely with them on long-term strategic management of their wealth. He believes in a goals-based approach to all areas of personal finance, retirement planning and investment portfolio management — one that is balanced and tactically opportunistic.

Michael graduated from the University of Regina with a Bachelor of Business Administration degree and holds the Chartered Investment Manager (CIM®) designation. He lives in Calgary with his wife and two daughters. When not working Michael spends time hiking, biking, playing hockey and golf and volunteering within the community.

Trevor Church, CIM®
Portfolio Manager,
Investment Advisor
TD Wealth Private Investment Advice

T: 403 292 2990
E: trevor.church@td.com

Trevor has been working closely with affluent families in the Calgary area for more than 25 years. His extensive experience with complex personal, family and business scenarios has helped successfully usher his clients through several business cycles by focusing on disciplined, goals-based strategies.

Trevor graduated from the University of Calgary with a Bachelor of Economics and holds the Chartered Investment Manager (CIM®) designation. He is active in the local community in a volunteer capacity with the Alberta Division of the Duke of Edinburgh International Award program, which encourages excellence, growth and development of youth. Trevor lives in Calgary with his wife and young daughter. A sports enthusiast, when he's not working, you'll often find him at the rink, on a ski hill or playing golf.

Leanne Brown
Client Service Associate
TD Wealth Private Investment Advice

T: 403 292 1804
E: leanne.brown@td.com

Prior to joining Smith Church Wealth Management more than 7 years ago, Leanne worked in a variety of positions with TD Bank Group and local branch offices. Leanne is regularly in touch with clients to facilitate all their interactions with the team. She aims to provide legendary client experience for clients, execute all administrative functions in a timely and accurate fashion and maintain team operations in compliance with financial regulations.

Leanne holds a Bachelor of Arts from the University of Calgary, majoring in Spanish (¡hola!). She lives in Calgary with her husband and two young children. Outside of the workplace, Leanne is busy with her young family, but finds time to enjoy hiking, camping and crafting.

Amy Struyk
Client Service Associate
TD Wealth Private Investment Advice

T: 403 299 8682
E: amy.struyk@td.com

Joining the Smith Church Wealth Management in 2020, Amy's roles include administrative support, client care and coordination, all while keeping the team up-to-date with its marketing and social presence!

Amy holds a Business Administration Certificate from Southern Alberta Institute of Technology. Her experience comes from the group insurance industry and the oil and gas sector, where she specialized in PR, marketing, and client relationships. Amy is a born and raised Calgarian. She holds a deep-rooted love for the city and the nearby Rocky Mountains. Amy loves exploring the world abroad, riding her motorcycle, taking photos of absolutely everything and sharing these experiences with her family.

Let us help create symmetry in your financial life.

We'd love to meet you. Get in touch anytime to set up a meeting to discuss how our approach can work for you and your family.

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Smith Church Wealth Management
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Suite 900, 421 – 7th Ave SW
Calgary, Alberta T2P 4K9
T: 1 800 449 5344 | **F:** 403 299 7984

www.smithchurch.ca