


TD Wealth



Stewart Wealth Advisory Group





Our process helps you live your purpose

At Stewart Wealth Advisory Group, everything we do is driven by you and your values. With years of experience working with affluent families, we have developed a highly refined process designed to help you focus on the things that matter most to you.

Anchored by an in-depth understanding of you, your personal values and your longer-term ambitions, our disciplined process will help ensure the many elements of your financial life are working together seamlessly in the shared pursuit of your goals.

We want to help you slow down and enjoy living your purpose-driven life.

We help you to build a strong foundation for the future

Our **Four Pillars of Wealth** philosophy balances the key elements of your financial life.

Building your net worth

We recognize how important it is to build on your wealth so you can enjoy the things that matter most to you and achieve your vision for the future.

Tax efficiency

You have worked hard to succeed and we want to help you make the most of your wealth by creating strategies that help minimize tax and keep income available as you need it.

Protecting what matters most to you

Because life is filled with uncertainty, we are committed to delivering advice and solutions to help protect the things you value most at every stage.

Leaving the legacy you envision

You are the driver of your journey; we help you map out the route. Our goal is to help you optimize the transfer of your wealth to those you care about most.

An Enlightened Approach

Achieving and maintaining financial independence takes a personalized strategy and a commitment to your core values and beliefs.

As your professional lead relationship manager, our goal is to provide complete wealth stewardship. We collaborate with a carefully selected team of specialists to mobilize your financial life into a personalized, full-spectrum strategy that evolves as you do.



Our Stewardship Formula

A retirement plan

Tax mitigation strategies

Business succession advice

Private banking solutions

Customized Credit

Estate and trust services

Asset protection strategies

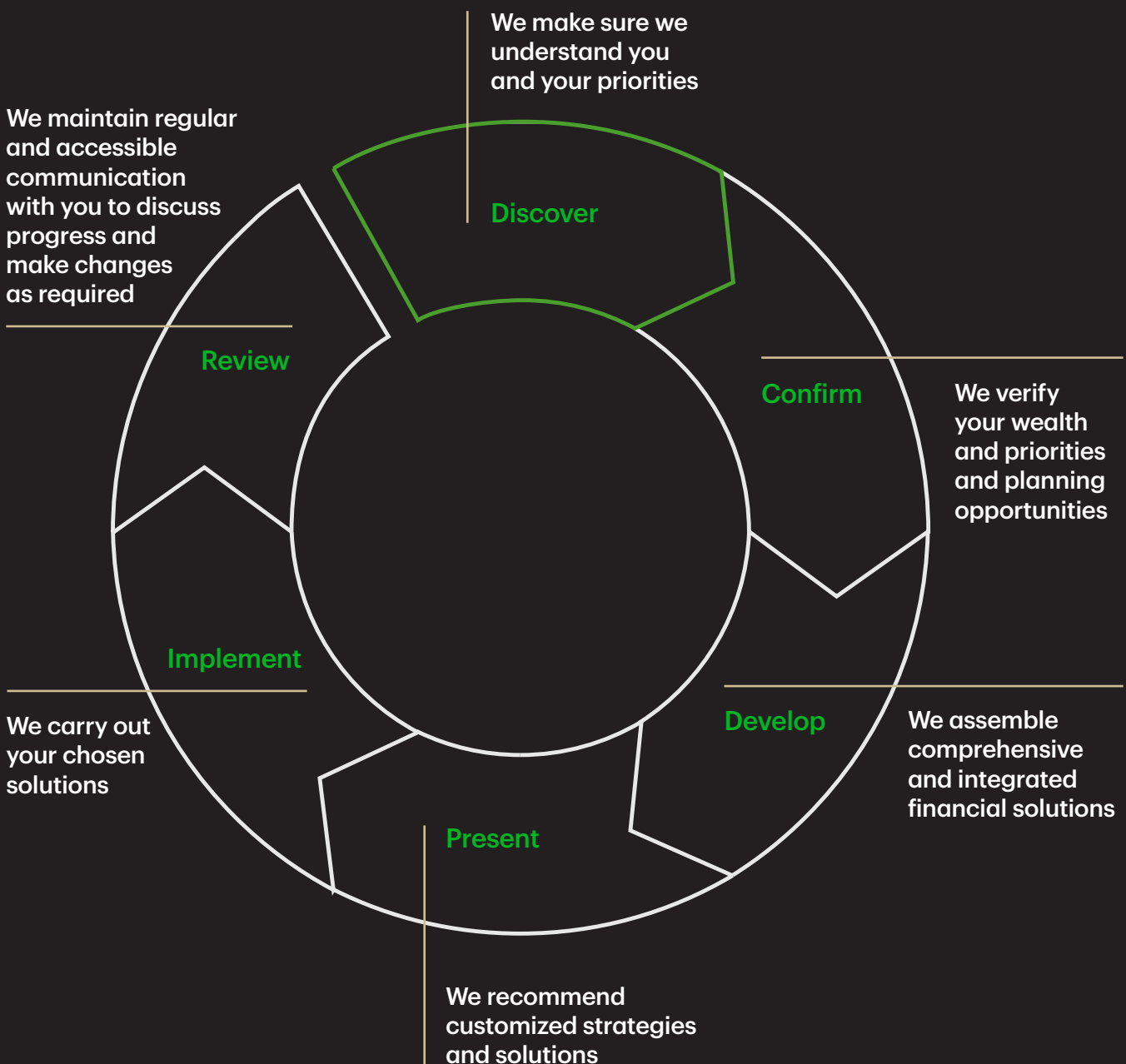
Philanthropic planning

Value added services

* Some of the services listed are provided in collaboration with TD Specialists.

A Proven Process

Our process begins with an initial deep discovery of you, the important people in your life and the vision of success you have for the future. Once we have a clear sense of what your goals are, we collaborate with you to prioritize these goals and, where appropriate, engage TD specialists to provide you with strategies and solutions aligned to each specific goal. Finally, we provide regular contact so we stay on top of any changes in your life.



Committed to excellence



Derek Stewart, B. Comm, CIM®, FCSI®

Associate Portfolio Manager & Senior Investment Advisor
TD Wealth Private Investment Advice

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Derek is the founder and lead advisor of Stewart Wealth Advisory Group. With more than 25 years' experience, Derek builds on his leadership of highly successful teams within TD Bank Group. Now, he is channeling his extensive industry experience towards specialized wealth stewardship advice for select client families.

A focused and process-driven leader, he can be counted on to do what's right for the families he serves. Derek builds on the principles of behavioural finance, combining this philosophy with clients' values and goals to keep them on track to achieve their visions of success for the future.

Derek graduated from the University of Calgary with a Bachelor of Commerce and holds the Chartered Investment Manager (CIM®) and the Fellow of the Canadian Securities Institute (FCSI®) designations. Derek's business focus and commitment to servicing the best interests of his clients are a natural extension of TD's client-centric focus.

Derek and his family have a deep appreciation for nature and spend much of their time exploring the river valley and mountains. They enjoy experiencing new adventures together with a mutual commitment to living purposeful lives aligned to their values and goals for the future.

Joanne Pederson

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Over the past 155+ years, TD has helped generations of clients with their personal, family and business assets in the ways that matter to them. TD has done this by building strong, transparent relationships and creating integrated, tailored solutions to help people reach their financial goals.

We look forward to discovering what truly matters to you.

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