Wealth Forums for Business Owners & Professionals

Wealth Management Strategies for You

Income Splitting Strategies
Shift income to children & dependents potentially save tax to pay for children's expenses
April 10, 2018
Dale Durand CPA, CA, CFP, Business Succession Advisor, Wealth Advisory Services

Estate & Business Succession Planning Strategies
Be ready for the Unexpected
April 24, 2018
Jeff Halpern CPA, CA, TEP, Business Succession Advisor, Wealth Advisory Services

Tax Changes for Private & Professional Corporations
Create a safe haven for investment income in your corporation, Create your own Individual Pension Plan, Corporate Insured Retirement Plan
May 1, 2018
Dale Durand CPA, CA, CFP, Business Succession Advisor, Wealth Advisory Services

Pension Style Investment Management
John Tedesco Regional VP, Invesco

To be held at:
220 Commerce Valley Drive West
3rd Floor
Markham, Ontario
L3T 0A8

5:30PM – 7:30PM
Refreshments will be Provided

RSVP 7 Days Prior to Your Chosen Event

Alan Kwan: (905) 707-6253
alan.kwan@td.com

An Exclusive TD Wealth Private Investment Advice Event

Hosted by:

Patricia Greco, CPA, CA, Investment Advisor
(905) 707-7012 | patricia.greco@td.com

Susan Yao-Arkilander, CFP, MBA, Investment Advisor
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