



#newnormal - nothing like I expected
but everything I was hoping for

I've always loved working, and the people I work with, but my family is #1.

I've been associated to The Morton Group, one way or another, since I started my career in Wealth Management fifteen years ago. It started when Tim offered me my first job at CIBC - filling a temporary mat leave contract for a sales assistant in 2005 (*technically it all started when James and I became friends and eventually started dating in High School!*). At the time, I had just finished my undergrad at McGill University and decided to shift course from my original career path in Law. James and I wanted to go backpacking but needed the funds and temporary work arrangements to help make it happen. I spent ten months working directly with Tim, Chris K., Charles, and his father - Chris W. I learned much about the business and after a few months in Europe and then working with a few different advisory teams, I decided to go work for the National Office at CIBC Wood Gundy (and eventually CIBC Wealth Management as a whole). While I was building my career at CIBC, James decided to shift his career from Property Development to Investment Management in 2009 and join The Morton Group. What used to be sporadic work-related questions at the cottage (from Tim and Chris) turned into almost daily conversations between James and me. We enjoyed the perks of making our date nights a tax-deductible expense if we discussed the pros and cons of Individual Pension Plans and Insurance Solutions for Business Owners.

But then in 2016, The Morton Group made the bold leap to TD Wealth. Our paths started to diverge, not because we were in different banks but because we had so many new priorities and challenges. James was taking on more of a senior role in the group as Tim was looking to enjoy more time in Florida and the cottage. My career was shifting quickly - I was now managing larger teams and a greater mandate, supporting not just Advisors nationally across Wood Gundy - but supporting Wealth Management businesses in multiple capacities. Our two young kids - Emily and Hayden (now 8 and 6 respectively) - were growing up fast. I was volunteering on the Board of our non-profit daycare, in the kid's classrooms, and engaging more actively in this new school and neighborhood community we needed as parents. At the same time, I was enjoying my new leadership role - working hard to demonstrate a balanced life approach managing family, work, and volunteering my time on charitable initiatives. But I struggled to find meaning in the work I was doing. I was missing the daily interaction with the people I was meant to be supporting first and foremost in my career - the client; and the idea of having my family's best interest as #1.

We made the decision for me to join The Morton Group in late 2019. The plan was perfect - leave CIBC in January, take some time to travel a bit as a family, and enjoy a few weeks to myself. My first official day at TD was February 19th. I had big plans to get the team energized and thinking ahead of new ideas they always wanted to try but never had the time or capacity to accomplish. I was keen to start a new marketing refresh - new pictures, refreshed website and all. I was planning to attend any upcoming meetings with all clients and explore future events to get out there and meet everyone! But then COVID-19 happened...

Late February discussions at The Morton Group was rightly focused on the market and possible implications of this virus that shut down most of China and was slowly making its way through Europe. In early March, it hit home hard as we had a confirmed COVID-19 case at our kids' elementary school. We feared the call from Toronto Public Health telling us to self-isolate - would we still be able to go to Washington DC with the kids as planned for March Break? By March 12th, the Ontario Government announced the closure of all public schools for the two weeks following March Break. I spent hours on the phone with Porter Airlines to cancel our flight to Washington, and March 13th was our last day physically in the office. We have been isolating at home ever since.

Since then, I've been developing detailed schedules to keep the kids entertained and educated. Organizing the house so we have the right setup for work, school, and family fun for the long haul (*and a sufficient stock of toilet paper*). I've created exhaustive meal plans to limit grocery trips and maximize efficient use of perishable goods and produce. Checking in on my family and friends (*remotely*) ensuring we can all remain connected and sane! As well as researching how to best support the local restaurants and associated businesses we love so much. I've also binged watched a lot of Netflix, ate a lot of candy and drank a lot of wine. I've accepted that my kids may not be going back to school this year. I've accepted that James and I won't be able to effectively perfect the work/life balance we had discussed as a married couple working together, for now.

But I am so thankful for the decisions we made that will allow me to achieve my goals of putting my family first. Not just my direct family but my full extended family (The Morton Group family as a whole - colleagues and clients). While these first few months were nothing like I planned, I'm so grateful to be able to add value in any way possible. Whether it be as minor as keeping the kids entertained so James can speak to you, helping the team to navigate new technologies required as we shift to work fully remotely on a temporary basis. These last five weeks have been enlightening. I've learned that my values have shifted slightly - health and mental wellness (*for myself*) was not in my top five before the pandemic, but my view is different now.

I look forward to hearing from all of you in the months ahead and learning about your values and what shifts may have resulted from the '*Great Closure*'. While this is not how I expected to start our first conversations, I'm hopeful it's the perfect way to navigate our new discovery process.

Stay safe and healthy and I look forward to meeting you all very soon.

Best,
Catherine Morton



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