Toms & Le

Wealth Management Group

TD Wealth

Wealth Management

The Toms & Le Wealth Management Group specializes in working with high-net-worth individuals and families to provide comprehensive services to attend to unique wealth management challenges. There is no one-size-fits-all wealth management strategy; every person, family and business requires a tailored solution.

Craig Toms, Dao Le and their team provide you with integrated services designed to address your varied needs and help you to achieve your goals while giving you the freedom to focus on your other priorities. Through each stage of your life, we work with you and draw from a team of TD specialists to provide transparent end to end support such as:

Investment management

Strategic tax planning

Personal and business succession advice

Estate and trust services

Charitable giving and philanthropy

Protecting your assets and managing risk

Financial and retirement planning

Cash-flow and credit management

Private banking solutions

Education

Helping you achieve your vision of success

Building net worth	**Implementing tax-efficient strategies**	**Protecting what matters**	**Leaving a legacy**

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. Our team of professionals can work with you to develop an effective plan to help you make your vision a reality.

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.

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.

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.

Understanding you

We start with a deep understanding of who you are, your values and your vision of success. This means reviewing the financial decisions you've made over the years, the goals you've set for yourself in the years to come, and the ways in which these reflect what is important in your life. To create your personal investment and wealth plan, we leverage our broad expertise to fit your unique needs.

Disciplined process

1 Our discovery process focuses on understanding your priorities and goals in order to better support them.

2 Once we understand your unique situation, we can help you develop a personalized wealth plan.

3 Next, we put that plan into action by constructing a portfolio that complements it. This phase involves an official onboarding as well as any account transfers required to begin implementing your plan.

4 Whenever your needs require specialized support, we will build a team of TD specialists who can help.

5 Your Advisor will stay in touch with you, keeping you up to date on what matters to you.

6 To ensure your wealth plan evolves as you do, we'll regularly review your priorities with you, helping you stay on track with your goals.

Our Team

A strong foundation is integral to building a lasting and dynamic structure. The foundation of the Toms & Le Wealth Management Group is experience, education, and integrity. Both Dao and Craig represent the pinnacle of experience and education in their field and their team has been hand-picked to provide the service, knowledge, and support to meet and anticipate clients' needs.

Craig Toms, MBA, CPA, CMA, CIM®

Senior Portfolio Manager, Senior Investment Advisor

Craig was raised in a small town in Newfoundland and Labrador. He graduated from the Royal Military College and became a Logistics' Officer in the Canadian Armed Forces. Craig served in Afghanistan in the inaugural tour of the "War on Terror" where he honed his strong work ethic and ability to lead with integrity. These are values he carries forward to this day. In 2004, after leaving the Canadian Army, Craig joined TD Wealth. He celebrated many successes throughout the years and is the former Chair of TD's National Advisory Committee. Craig earned a Master of Business Administration (MBA) from Queens University and holds a Chartered Professional Accountant (CPA) designation which provides training to make strategic recommendations based on an organization's financial situation and is valuable for tax minimization strategies throughout portfolios.

Craig has two children, son Mitchell and daughter Maddix.

Dao Le, MBA, CFA

Senior Portfolio Manager, Senior Investment Advisor

Dao was an operations manager for a textiles manufacturing company and an Officer in the Canadian Armed Forces Reserve before he started working in the investment industry. Starting in 2002, he spent eight years on Bay Street in Toronto gaining invaluable experience in the equity and fixed income markets as well as working at a national level on pension style investing. He used the expertise from working on a trading floor and with some of the top institutional portfolio managers to transition to working with high-net-worth clients.

Dao earned a Chartered Financial Analyst (CFA) designation in 2004 and holds a Master of Business Administration from the University of British Columbia. Dao is married to Sarah, and they have two daughters.

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