TD Wealth

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Wealth management advice based on your unique goals

As a Vice President, Investment Advisor at TD Wealth Private Investment Advice, I provide personalized investment strategies and wealth management services to you, my clients, including long term retirement planning, efficient tax strategies and multi-generational estate planning strategies. My dedication to exceptional client experiences and diversified financial strategies that help navigate you through potential investment decisions are the foundations of my business. I focus on realistic results-based strategies built for today's markets.

I lead the knowledgeable team at Turek Walker Wealth Group located at the Vancouver downtown location. My team and I offer comprehensive wealth management services by engaging TD Specialists who can help provide investment, tax and estate planning strategies designed for divorced/separated couples, successful executives, professionals, business owners, pre-retirees, retirees and well-established families who require conservative growth strategies and long term retirement planning.

Our approach is a 4 step process always striving to keep it informative, friendly and comfortable:

1. We begin working with you by learning and discovering what's important to you and your family.

2. Next, we create your personalized investment portfolio, using an easy to understand process, that helps meet your income and growth needs.

3. We then work together to develop a wealth plan based on your objectives and implement appropriate changes to your existing portfolio to help maximize your gains and minimize your risks.

4. And finally, we monitor your progress and keep you up to date.

I have been an investment industry professional since 1996. I hold the following designations: (1) Fellow of Canadian Securities Institute (FCSI®), (2) Certified Financial Planner (CFP®), (3) Personal Financial Planner (PFP), (4) Financial Management Advisor (FMA), (5) Elder Planning Counselor (EPC) and (6) Certified Divorce Financial Analyst (CDFA®). I have also completed the Wealth Management Techniques Course (2007) through the Canadian Securities Institute. Additionally, I am licensed as a Life Insurance Advisor with TD Wealth Insurance Services.

I spend my personal time as a hobby bee keeper, traveling all over the world (mostly to Devon, England visiting our family 15th century Thatch cottage), gardening, hiking, biking, golfing, yoga, baking and spending quality time with my loving husband and best friend, Mark and my beautiful super smart 26 year old daughter Kyra. Our favorite family pastime is watching movies with a bucket of popcorn after a long hike or bike ride. I also share in caring for the family dogs Lexi (BichonFrise) and Oscar (Victorian Bulldog).

Turek Walker Wealth Group