TD Wealth

TD Wealth Private Banking, Family Office

A Legacy of Excellence

For more than 170 years, TD has had the privilege of helping generations of Canadians steward their wealth.

At TD Wealth Private Banking, Family Office, we specialize in working with high net worth and ultra-high net worth individuals and families, entrepreneurs, business leaders and corporate executives to help preserve and grow their wealth.

We understand your unique aspirations and craft strategies to help achieve your vision.

Our Distinctive Approach

Helping to simplify your financial life, so you can focus on what matters most

Simplifying your financial life

We understand the unique opportunities and complexities that wealth can bring. Our goal is to help simplify your financial life, allowing you to focus on what matters most. A team consisting of your Senior Private Banker, Family Office and experienced TD specialists will serve as your points of contact for your personal and business financial needs.

Elevated personal service

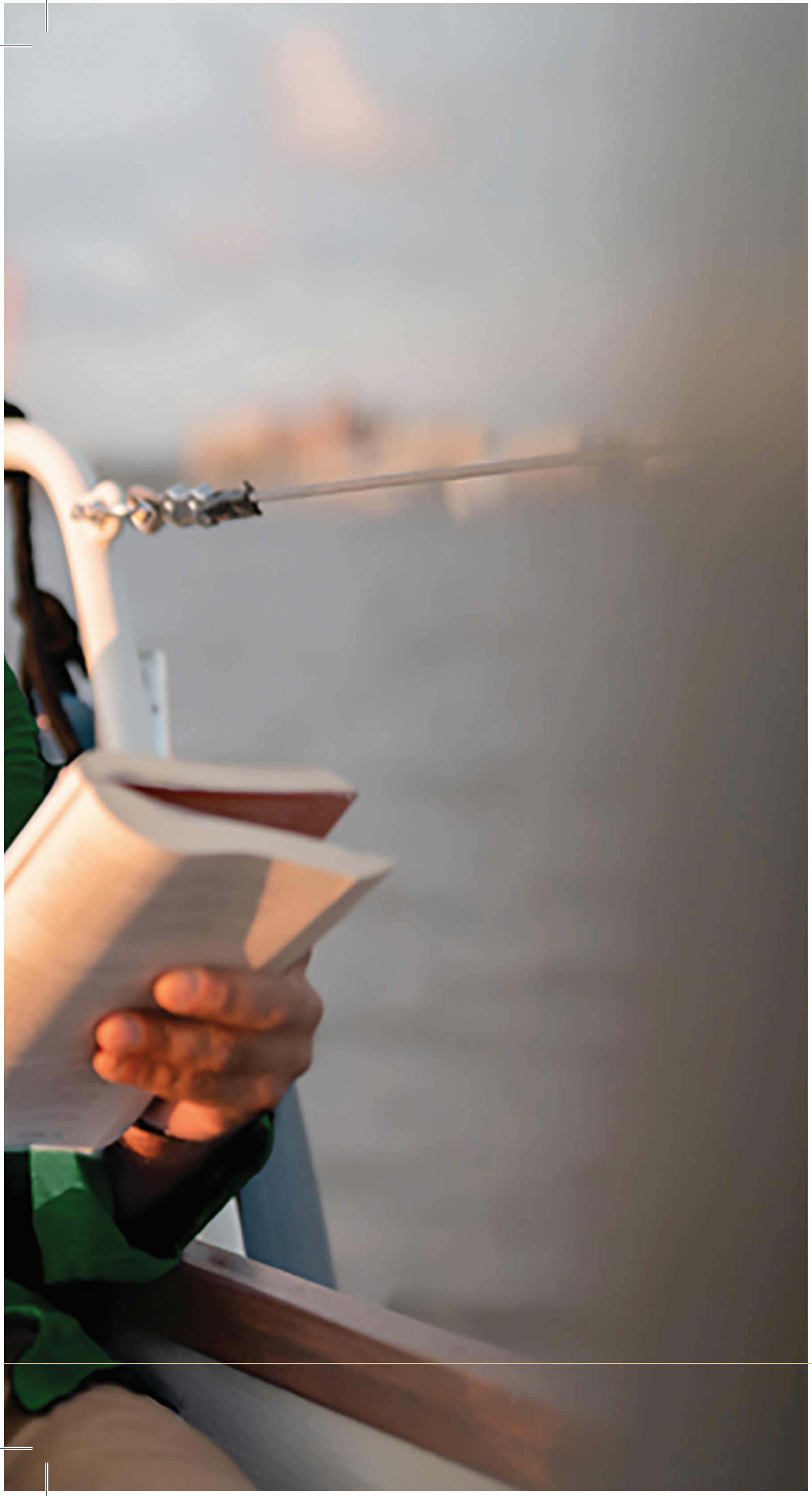
Our low client-to-banker ratio is by design. This approach will help to ensure that you receive highly personalized attention for your financial needs. Our utmost priority is to promote an authentic and trusting relationship with you that will stand the test of time.

Your trusted team

We are committed to serving your dynamic needs by leveraging the full breadth of TD, one of Canada's most trusted brands. Your Senior Private Banker, Family Office can help unlock the best of what TD has to offer through collaboration with dedicated specialists in TD Business Banking, TD Securities, and TD Wealth Private Wealth Management.

An enriching, exclusive community

Our client community includes prominent individuals and families with ambitious visions for the future. Our network of exclusive events serves as a gateway to meet and exchange ideas, experiences and socialize with peers.



A Disciplined Approach

Deep discovery

An in-depth discovery process helps your Senior Private Banker, Family Office and team of experienced TD specialists to understand your priorities and create a bespoke wealth plan to suit your unique aspirations.

Specialized knowledge

The team will work with you and your trusted professionals to create, review, and continuously monitor your financial goals, as well as discuss specific planning ideas and actions.

Tailored advice

Personalized advice is provided through every stage of your financial journey, helping to ensure your wealth plan reflects your vision and the legacy you wish to build for generations to come.

Comprehensive Services for Your Wealth

Building your net worth

We know how important it is to build your wealth so you can enjoy life's priorities. Working together, the team will develop innovative strategies to help grow your net worth by identifying credit strategies and investment solutions that match your current lifestyle and needs. The team can work with you to develop an effective plan that will help you achieve that vision.

Implementing tax-efficient strategies

You have worked hard to accumulate your wealth, and we want to help you make the most of it. Working together and closely with you and your tax advisors, the team can create an integrated wealth strategy that structures your investment portfolio in a way that helps to reduce tax exposure, while keeping income available as and when you need it.

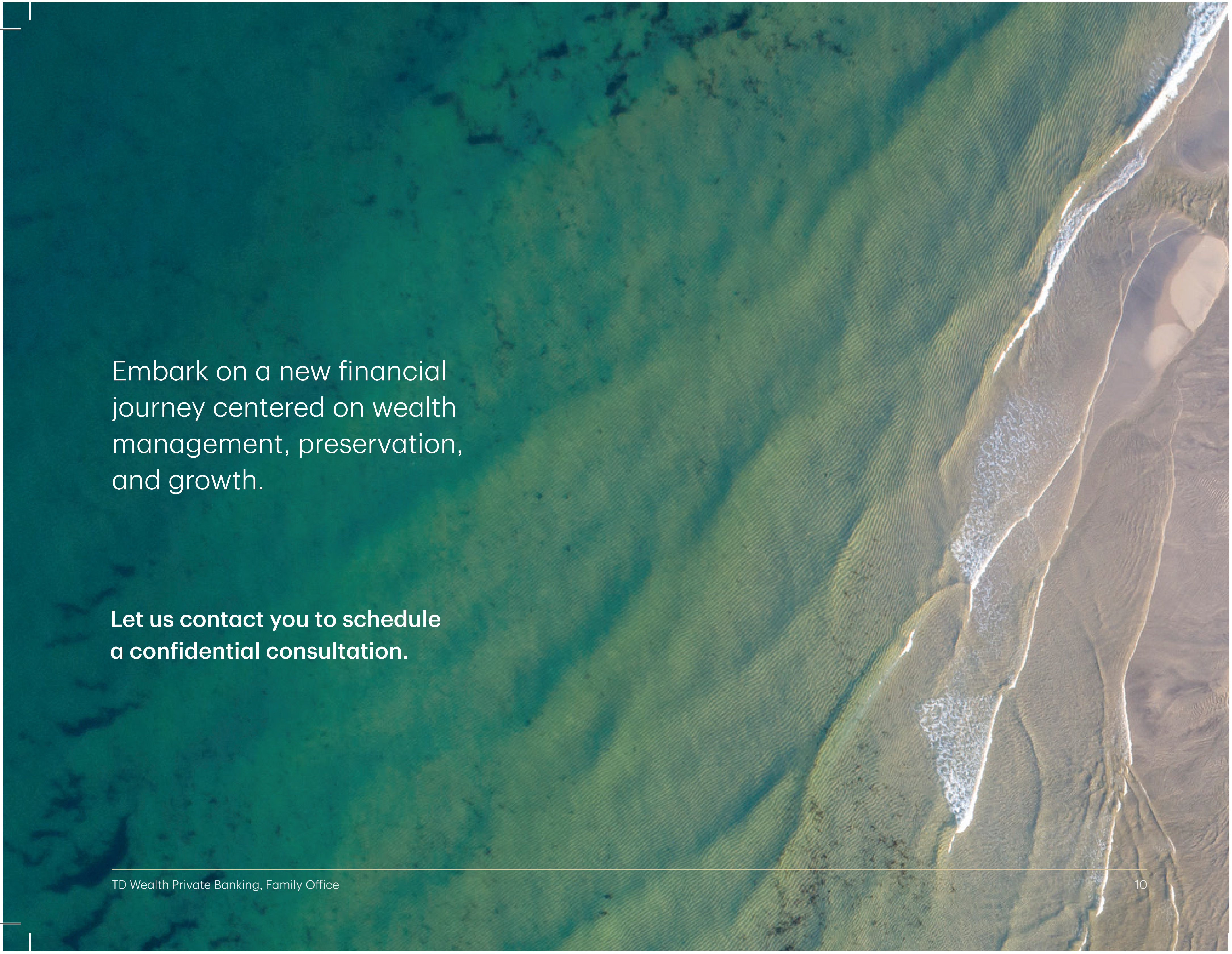
Your Senior Private Banker, Family Office, and team of experienced TD specialists are focused on your long-term growth and success, providing guidance and curated strategies and solutions that align across four areas:

Protecting what matters most to you

Life is filled with uncertainty, and that's why we're committed to delivering advice and solutions that help protect the things you value most. Whether through risk strategies or connecting you with specialists in trusts, estates, and other risk mitigation solutions, the team has the expertise to create a comprehensive plan that's right for you.

Preparing for the legacy you want to leave

You are the architect of your legacy, and we can help you with the blueprint. The team will collaborate with you to identify your top priorities, from estate planning to gifting and philanthropy. Our goal? To help you optimize the transfer of wealth to those who matter most to you.



Embark on a new financial journey centered on wealth management, preservation, and growth.

Let us contact you to schedule a confidential consultation.

Please contact your Senior Private Banker, Family Office
Brian Valvasori for more information.