TD Wealth

You decide where you want your wealth to take you.

Chui Au
Gestion de patrimoine familial
Family Wealth Management

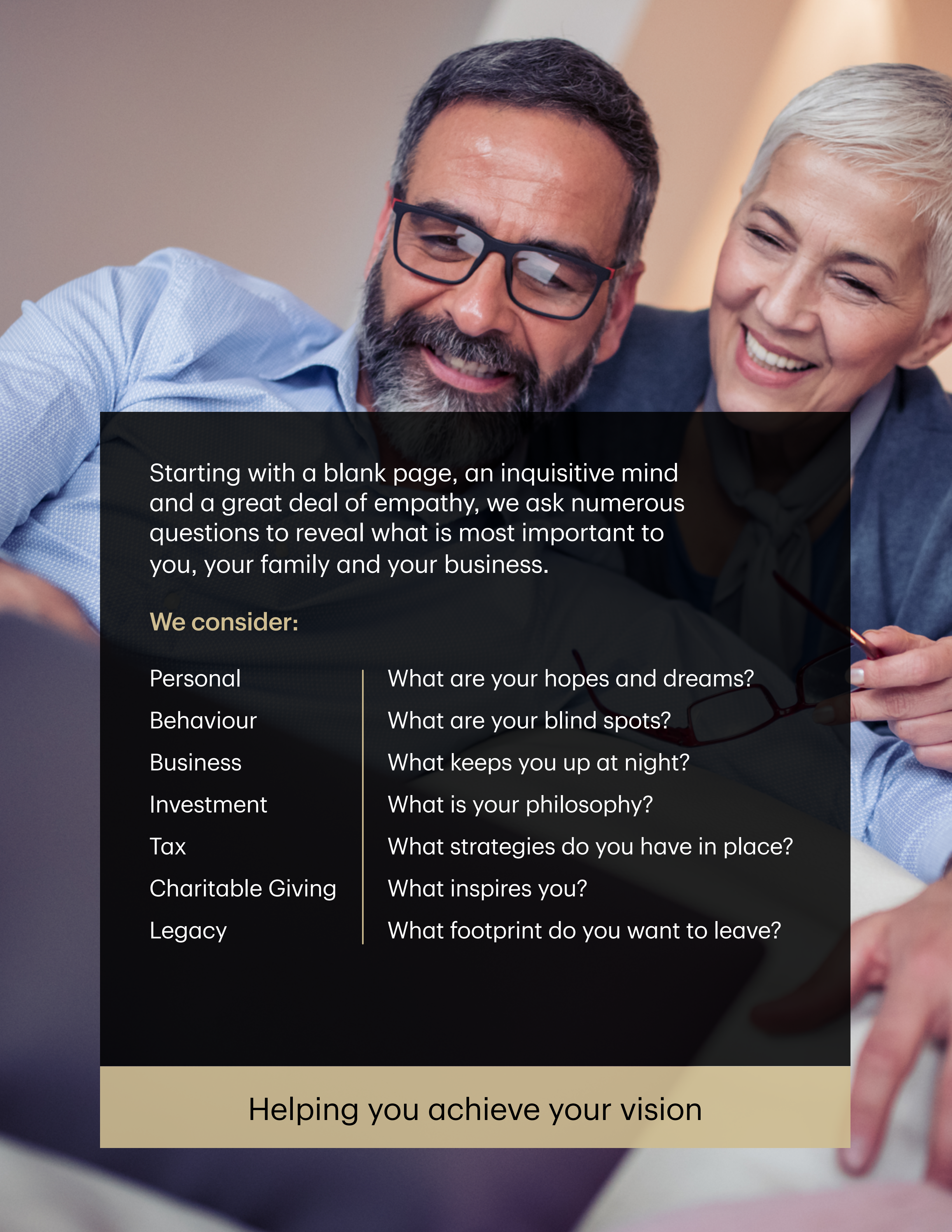
We design a path
to get you there.

Financial intelligence tailored to you

Completely committed to you and your family

At Chui Au Family Wealth Management, we believe we have earned our reputation as inspirational wealth managers by consistently striving to exceed expectations in everything we do.

We are committed to ensuring that all aspects of your financial life are working together intelligently. Step by step, we will help you achieve your goals — today, and into the future.



Starting with a blank page, an inquisitive mind and a great deal of empathy, we ask numerous questions to reveal what is most important to you, your family and your business.

We consider:

Personal	What are your hopes and dreams?
Behaviour	What are your blind spots?
Business	What keeps you up at night?
Investment	What is your philosophy?
Tax	What strategies do you have in place?
Charitable Giving	What inspires you?
Legacy	What footprint do you want to leave?

Helping you achieve your vision

Committed to providing the right advice for every life stage

We know that your needs will evolve over time. Our comprehensive wealth process and disciplined approach is designed to address both your short-term needs and your long-term goals.

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.

Implementing tax-efficient strategies

You've worked hard to accumulate your wealth and we want to help you 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.

Wealth that works from all angles

Our unique wealth management model allows us to create a wealth strategy that is completely customized to your needs, goals and dreams.

Our Process

1. Introduction to TD Wealth
2. Deep Discovery
3. Present Wealth Plan / Road Map
4. Implement the Strategy
5. Ongoing Proactive Advice
6. Review Meetings

*Some services are offered by TD Specialists.

Empowering you to do better through knowledge, insight and access

Distinct discovery process

Drawing on the cutting-edge field of behavioural finance, our distinct Discovery Process aims to uncover your unique Wealth Personality and what drives your financial decision making.

Capital preservation

As your wealth stewards, our primary objective is to protect your capital. We proactively fine-tune for regular, sustainable growth — and to ensure your portfolio continues to meet your evolving needs.

Customized investment solutions

Our clients benefit from our access to institutional-quality discretionary investment solutions. We prefer investment vehicles that allow us to tap into opportunities and take swift action when risk threatens.

Purposeful communication

We go beyond statements and reports, tracking your performance against your goals in our annual Strategy Review Meetings. In addition, we keep you up-to-date with wealth trends through our monthly newsletters and regular market commentary.

Strategic wealth planning

Working closely to understand your needs and goals, we will determine your optimal asset allocation and develop a tax-efficient, comprehensive wealth plan that evolves as your needs and goals change.

Ongoing client education

We constantly seek new ways to bring the best of the industry to you. We are passionately committed to improving financial literacy, and wish to empower you to make the best financial decisions for you and your family.

We apply the principles of behavioural finance to uncover your financial blindspots and eliminate biases that may prevent you from achieving your full wealth potential.

We care, and it shows

Surround yourself with a passionate and dedicated team who has the experience, knowledge and perspective to take care of you and your family's various wealth needs.

Si Chen
Client Relationship Associate

Wendy Chui
Senior Investment Advisor

Christopher Au, CFA®
Investment Advisor

Cathy Campbell, CIM®
Client Relationship Associate

Wendy Chui
Senior Investment Advisor
TD Wealth Private Investment Advice

For over 30 years, Wendy has helped individuals and families achieve their financial objectives by developing goal-oriented, integrated wealth management strategies. She earned her Financial Management Advisor (FMA) designation in 2005, and has been an Investment Advisor with TD Wealth Private Investment Advice since 1994. Prior to joining TD Wealth she headed up Asian Private Banking at the Bank of Montreal, and before that she was a professional currency trader.

Wendy graduated from the University of Guelph with majors in Economics and Business Management. Wendy is passionate about educating girls and women about finance. In addition to the many events she hosts focusing on financial literacy, she also sponsors girls' education in the developing world, and currently serves on the Boards of a private school and The Giving Foundation.

When she is not working or volunteering, Wendy pursues her love for cooking, fine food, travel and reading.

Christopher Au, CFA®
Investment Advisor
TD Wealth Private Investment Advice

Christopher works closely with clients to address their wealth needs, and is committed to delivering an exceptional client experience that begins with a deep understanding of their unique needs, circumstances and long-term financial objectives.

Christopher has over 10 years of industry experience and began his career in financial services in 2013. Prior to joining TD Wealth Private Investment Advice, Christopher worked at a private institutional asset management firm that managed North American Equity strategies. From there, he joined General Electric's (GE) Global Financial Management Program, where he completed four intensive corporate finance assignments across North America, including financial planning, controllership, operations analysis, and commercial finance.

Christopher graduated with distinction from Concordia University's John Molson School of Business with a Bachelor of Commerce, majoring in Finance. He later obtained a Graduate Diploma from McGill University as well as the Chartered Financial Analyst (CFA®) designation.

Si Chen
Client Relationship Associate
TD Wealth Private Investment Advice

Si started her career in the Bank of Montreal's compliance department; from there, she joined Birks Group Inc. in 2014 as a Payment and Credit Operation Manager with extensive experience in the luxury retail industry. Si joined Chui Au Family Wealth Management in January 2020.

Si graduated from Concordia University's John Molson School of Business with a Bachelor of Commerce in Accounting and Marketing. In addition, she completed 3 intensive gemology courses and finished the Administrative de la relève (ADR) program from the College of Corporate Directors (CAS) of Laval University.

Si is passionate about public speaking and community involvement.

Si spends her free time pursuing her love for fashion and poetry.

Cathy Campbell, CIM®
Client Relationship Associate
TD Wealth Private Investment Advice

Cathy developed the core of her professional experience during her 14 years at TD, where she held roles in Banking and Direct Investing. Cathy returned to TD and joined Chui Au Family Wealth Management as a Client Relationship Associate in 2018 after a few years as Wealth Associate Advisor at RBC Dominion Securities. She has extensive experience working with high-net-worth families, drawing on her deep investment knowledge.

Cathy holds a Bachelor of Arts in Economics from Concordia University and holds a Certificate of Advanced Investment Advice as well as the Chartered Investment Manager (CIM®) designation.

Cathy spends her free time pursuing her love for baking, reading, hiking and trail running.

TD Specialists we collaborate with

Teresa Malowany
CPA, CA, Fin. Pl.

Market Manager
Specialized Services Team
TD Wealth

Teresa provides advanced financial, tax, estate and business succession planning assistance to owner/managers and high-net-worth families. She creates integrated and customized wealth plans to help clients identify and reach specific goals. Teresa has more than 20 years of experience in the fields of tax, accounting and financial planning.

Patrick Absi
LL.B., CLU, Fin. Pl.

Financial Security Advisor,
TD Wealth Insurance Services

Patrick has over 25 years of experience in the life insurance industry. Working closely with your advisor, Patrick employs a comprehensive process to assess your wealth management needs and then recommends creative, tax-exempt insurance strategies to help address them.

Andrea Araujo
Fin. Pl., RHU

Financial Security Advisor
TD Wealth Insurance Services

Andrea has over 10 years of experience in the life insurance industry including roles such as Living Benefits Advanced Case Consultant. With clients, she believes in the importance of full financial planning and using insurance solutions to enhance clients' overall financial health while ensuring all their goals are achieved. Andrea speaks English, French and Portuguese.

François Desmarais
M.Fisc., Fin. Pl., TEP

Tax and Estate Planner,
TD Wealth

François is a Tax and Estate Planner with over 25 years of experience. His goal is to provide his clients with confidence by proposing integrated solutions to optimize the transfer of wealth to the next generation. François holds a financial planning designation and a Master's degree in Taxation.

A streamlined client experience

We work closely with a team of TD Specialists to coordinate and personally oversee the execution of your wealth strategy.

Tell us your story.
We're listening.

Contact us to learn more about our intelligent approach to wealth management and begin the discovery process.

Chui Au Family Wealth Management
TD Wealth Private Investment Advice

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We look forward to discovering what truly matters to you.