TD Wealth

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Wealth management advice based on your unique goals

As Senior Vice President, Portfolio Manager, and Investment Advisor, I lead the Legacy Wealth Advisory Group at TD Wealth Private Investment Advice in Calgary. Myself and my five team members provide affluent individuals, business owners and their families with investment advice, helping them develop and execute a personalized financial plan tailored to their personal and financial situation.

Whether it be children's education, business succession, retirement, estates, or tax planning, I will work with clients to help prepare them for life's ups and downs that don't match the market, and collaborate with TD specialists to help them minimize taxes and structure their estates in a tax-efficient manner.

I hold the Certified Financial Planner (CFP®) and Charter Investment Manager (CIM®) designations, and I've been working with TD since I graduated from University of Alberta in 1999. I started off as a Financial Planner and made my way up to become an Investment Advisor in 2009. During my time at TD I've won numerous awards, including the Vision in Action Award which is the highest form of individual recognition a TD employee can receive. Recipients are chosen because they embody the spirit of TD's Guiding Principles.

Outside of work, my wife and I enjoy spending time with our three young children and taking them to their swimming, hockey and dance classes. As a family, we enjoy getting outdoors to explore Calgary and surrounding areas.

Legacy
Wealth Advisory Group