TD Wealth

Who I serve

While each client is unique, there are a few commonalities that might help you determine if you could benefit from our services:

- The majority of my clients are retired or within 10 years of retirement.
- Most clients are relatively conservative and place a higher value in preservation of their capital and modest growth with less emphasis on taking the risk in an attempt to generate double digit returns.
- My clients are busy and less interested in the day-to-day activities of the investment world.
- Most clients have a long-term perspective and value the wealth plan that we create and maintain for them over the years; they are not interested in a short-term view of the world.
- My business owner clients, regardless of the industry, have found success in their field but appreciate and make the time for us to help them implement business succession and estate preservation strategies.