TD Wealth

About your Quarterly Portfolio Report

At TD Wealth Financial Planning, we make it a priority to provide you with performance reporting that is timely and reflects your financial goals. We are making investments to improve the consistency and transparency of our client reporting in our account statements, online in WebBroker and from your Financial Planner.

In 2017 we will introduce an enhanced account statement with new reporting on investment performance and a more detailed outline of the costs associated with your accounts. Your TD Strategic Managed Portfolio (TD SMP) will be included in these statement enhancements so you have a consolidated view of your portfolio's performance and clarity on how your investments are tracking toward your financial goals.

As a result, we will discontinue the current TD SMP Quarterly Portfolio Report following this issue. Your new account statement will be available in 2017 online through WebBroker eServices or by regular mail, based on your current preferences for delivery and frequency. ■

We value your business. If you have any questions or require additional support, please contact your Financial Planner.