

Life, simplified.

The TD Care Connect service can help manage your financial affairs and arrange personal care services



You've spent your life working hard, saving your money and making plans for the future. Now, as you put those plans into action, you may wish to focus more on enjoying life without the regular burden of administering your affairs

TD Wealth Private Trust can help.

You and your caregivers can rely on our TD Care Connect services to help you. We can effectively manage your day-to-day financial affairs, whether it's organizing your income sources, paying bills, or preparing your income tax return.

We are here to help. We can arrange for a broad array of personal care services to simplify and improve your everyday life.

Our services are designed to help you focus on what's most important to you, knowing you have the support, guidance and knowledge of our team of professionals. Think of us as a trusted resource you can turn to when you have questions or challenges.

The strength of our TD Care Connect service is its flexibility. We are here to assist you, even as your needs evolve over time and become more complex. Your life remains in your control, but with the support you need. After all, you've earned it.



Our Trust Officers can help you with a broad range of services, including:



Personal and financial inventory: Gain a clear picture of your assets, including your investment portfolio, as well as any ongoing income sources and expense needs. Building this inventory is an important first step when it comes to day-to-day financial management and estate planning.



Day-to-Day financial management and income planning: You can direct your income (e.g., pensions, investments and annuities) to a TD Care Connect account to help ensure your expenses are paid in a timely manner. We can also consult with your TD Wealth advisor, to help ensure the funds you don't need are invested in accordance with your instructions.



Account monitoring: Feel secure knowing the transactions in your TD Care Connect account and on any related credit card(s) are being monitored to help protect you from fraud.



Tax services, including annual return preparation and filing: Work with our Trust Officers to collect your tax receipts and then you can sit back as our tax specialists prepare and file your personal income tax return, leveraging their experience to help identify any applicable tax-saving opportunities.



Additional service related to personal care and lifestyle management: We can help you arrange for personal care and lifestyle management services that will allow you to access support, both inside and outside the home. These may include services such as 24/7 medical alert services, elder care services, property management and much more.



Estate planning: Help protect your assets and provide for your family by working with our Trust Officers and your own independent legal advisors to develop a comprehensive estate plan that contemplates your Will and Powers of Attorney, as well as any trusts and charitable bequests you would like to put in-place.



Family education services: Provide your family and loved ones with access to a variety of educational articles and other resources that can help improve their understanding on a variety of financial topics.

At TD Wealth Private Trust, we want to make sure you're taken care of. Our TD Care Connect services are designed to help make your life easier. Our services are designed to help you remain independent and in control while relying on your Trust Officer to provide you with the level of guidance, support and resources you need, when you need it.



To learn more about how TD Care Connect services can assist you, your family and your caregivers, speak to your TD Wealth advisor or a local TD branch.



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