TD Wealth

Wealth management advice based on you

The Tax and Estate Planner of the Wealth Advisory Services team applies expertise in estate, trust and tax planning to assist you in developing an estate plan that reflects your personal choices for the future, and the legacy you will leave behind. To help manage your responsibilities, we can work with other TD specialists and external subject matter experts to help identify issues and properly structure your estate in a tax effective manner.

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With over 25 years' of estate, trust and taxation experience, Ian has spent his career actively focused on providing holistic and comprehensive estate planning solutions to individuals, families and businesses, often consulting on complex issues.

Ian has been a member of the Ontario Bar since 1990 and was in private practice focusing on estate planning and taxation until 1994, when he achieved his Masters of Law in Taxation. From 1994 to 2006, Ian held various positions with the Law Society of Ontario related to lawyer training and accreditation in the areas of estates, trusts, and taxation.

In 2007, Ian joined TD as a Will and Estate Planner and he advises clients on the structure of their wills and often assists in the creation of trusts, which can be particularly valuable tools to provide for beneficiaries with special needs. Ian works closely with clients and their outside advisors to implement strategies that will best help meet their unique circumstances.

Ian is an experienced professional who will work with you every step of the way to help you and your family progress towards achieving the goals and dreams you all share.