RBC WEALTH MANAGEMENT

Prashant Patel, ASA, CFP, TEP

Vice President, High Net Worth Planning Services
RBC Wealth Management Services

Prashant has assisted high-net-worth and ultra-high-net-worth families with tax, estate and retirement issues since 1992.

His guidance supports clients in their relationships with their external professional advisors, with whom he frequently interacts.

His expertise includes tax and estate planning for executives, business owners, retirees, sports professionals and individuals with U.S. issues. He also assists individuals facing significant financial events (sale of business, financial windfall, retirement, job loss, moving to Canada, leaving Canada, etc.)

Prior to joining RBC in 1999, Prashant honed his expertise by working as a Canadian and U.S. tax specialist for two of the big four accounting firms in downtown Toronto.

Prashant is a Certified Financial Planner, Associate of the Society of Actuaries and member of both the Society of Trust and Estate Practitioners and Canadian Tax Foundation.

Wealth Planning Consultation

Prashant works closely with your advisor to identify strategies and solutions on structuring your affairs in a manner that addresses your overall wealth planning needs, which you would then discuss and implement with your accountant or lawyer.

To schedule a meeting with Prashant Patel, please contact your advisor.

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There's Wealth in Our Approach.™