RBC Dominion Securities Inc.

Philip, Wright & Associates Private Investment Management of RBC Dominion Securities

Wealth Management
Dominion Securities

Our mission

As your Investment Advisors, our mission is to make a valuable contribution to your life by providing quality advice, sound portfolio management and excellent service. With the resources of Canada's leading full-service wealth management firm at our disposal, you'll receive the advice, analysis and solutions you need to help you reach your goals.

Who we can help

We specialize in managing wealth for high-net-worth families, professionals and business owners. Covering asset management, financial and estate planning, tax strategies and insurance solutions, our approach is comprehensive and evolves as your life does.

Our relationships are built on trust

With over 80 years of combined experience in financial services, our team of professionals is committed to building long-term relationships based on the core values of fairness, integrity and trust.

Lifetime partnership

We are committed to a consistent, long-term partnership with you and your family. As you transition from building your assets to transferring wealth to your heirs, we'll be right there with you as your personal financial guides.

Our service commitment to you

At Philip, Wright & Associates Private Investment Management of RBC Dominion Securities we strive to provide best-in-class service and advice – personalized to you. Through regular meetings, customized reporting packages and discretionary wealth management, you will appreciate how different we are.

Services include:

- Development of your customized Investment Policy Statement
- Regular, in-person portfolio reviews
- Consolidated performance reporting and interim review packages
- Coordination with your accountant, lawyer and other professionals
- Direct access to your own personal Portfolio Manager
- Business succession planning
- Family wealth management
- Financial and retirement planning
- Professional will and estate consultation
- Insurance strategies and tax minimization

Because wealth management is an ongoing process to help guide you and your family through each stage of your life, your wealth management services will be tailored to your current situation and future goals. As your goals and circumstances change over time, we will bring in additional services as needed for a continuous, integrated approach to managing your wealth.

Our investment philosophy

At Philip, Wright & Associates Private Investment Management of RBC Dominion Securities, your money is as important to us as our own. Our investment philosophy is based on discipline and sound analysis, ensuring the utmost attention is paid to your portfolio.

We are focused on managing risk, and preservation of your capital is our highest priority. The portfolios we build are designed to generate income first and then to capitalize on growth opportunities with acceptable levels of risk. Through the use of individual securities and exchange-traded funds we are able to provide our clients with a more effective solution than the mutual fund programs that dominate the investment industry today.

We would be happy to discuss our investment process in more detail with you. Please feel free to contact us.

Private Investment Management – our premier investment offering

Our services are anchored by Private Investment Management (PIM), which gives you access to a fully accredited, local Portfolio Manager. Your Portfolio Manager makes day-to-day investment decisions on your behalf, adhering to the guidelines established in your own customized Investment Policy Statement.

Through a thorough process involving tactical asset allocation and individual security selection, as well as ongoing reviews and monitoring of your investments, we manage your portfolio according to the highest standards of professionalism and security. The RBC Dominion Securities Investment Strategy Committee will also review your portfolio on a quarterly basis to ensure it meets the high standards set out in your Investment Policy Statement.

A comprehensive approach to building and protecting wealth

Your roadmap for the future

Wealth management is a comprehensive approach to achieving your financial and life goals. It extends beyond investment advice to help you protect your wealth for the future, plan for retirement and create a legacy for the future as you think ahead to transferring your wealth to your family or charity.

With the wealth management approach you also gain the confidence to make sound financial decisions, plus the freedom to live life as you envision it. It also provides a clear roadmap for your family's future by addressing your financial needs at each life stage. Every step of the way we will be there as your personal guides.

The wealth management approach can help you to:

- Clarify individual needs
- Establish specific goals
- Bring together the right expertise and solutions to manage your wealth

Please view our "Comprehensive Approach to Building and Protecting Wealth" brochure for an in-depth look at our wealth management strategy.

Putting you first with a team approach

Stephen G. Philip, CPA, CA, CIM, FCSI
Senior Portfolio Manager

Steve has been advising investors at RBC Dominion Securities for over 30 years. As a licensed Portfolio Manager, he focuses on providing unique investment solutions to high-net-worth investors and managing their portfolios through Private Investment Management. Steve's professional background includes both CA and CPA, two of the most demanding designations in the financial industry.

James D. Wright, B.Comm., CIM
Associate Portfolio Manager

Jamie has over 25 years of experience in the financial services industry, including national sales manager for a leading ETF management firm, and prior to that, over 9 years at RBC Royal Bank. Jamie's focus is on the execution of portfolio strategy as well as providing trusted wealth management advice to high-net-worth families, professionals and business owners.

David Keenleyside
Associate Advisor

Over the course of a 30-year career in financial services, David has accumulated valuable wealth management experience, having worked for a Canadian trust company and a major Canadian bank. He is a past President of the Brockville and District Chamber of Commerce, a charter member of the Economic Advisory Team for the City of Brockville and a member of the Rotary Club of Brockville.

Eva Beattie
Associate

With a combination of 23 years of service with the Ministry of the Attorney General and over 10 years as an Associate at RBC Dominion Securities, Eva brings to our team extensive administrative experience. Her effective interpersonal skills and attention to quality and detail ensure exceptional client service.

The resources of Canada's leading wealth management firm

RBC Dominion Securities has been helping clients achieve their goals since 1901.

At RBC Dominion Securities our vision is simple: to always earn the right to be our clients' first choice for wealth management services.

For more than a century we have helped individuals, families, businesses, charitable foundations and other organizations build on and preserve their wealth through sound financial planning, trusted investment advice and unparalleled wealth management solutions.

Today, with over 420,000 clients across Canada and worldwide and CA$305 billion in assets under administration, RBC Dominion Securities is Canada's leading full-service investment and wealth management firm.

We would be pleased to meet with you for a complimentary consultation. Contact us today.

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