



Wealth Management  
Dominion Securities



Julie Brouillette, CFA  
Senior Portfolio Manager  
Tel: 418-527-7241  
julie.b.brouillette@rbc.com

Samuel Perreault, B.B.A.  
Associate  
Tel: 418-527-1612  
samuel.perreault@rbc.com

# Advice, expertise and services to help you achieve your financial goals

Brouillette Group  
of RBC Dominion Securities  
Complexe Jules-Dallaire, Tour 1  
2828 Laurier Blvd 8th Floor, Suite 800  
Quebec City, QC G1V 0B9  
Tel: 418-527-7241  
Fax: 418-654-0535  
Toll free: 1 800-340-6968  
ca.rbcwealthmanagement.com/web/julie.brouillette

## Advice

- Professional guidance and one-on-one investment advice
- Customized strategies based on your unique financial situation, retirement goals and risk tolerance
- Strategic business ownership planning
- A wealth management plan to use as your “roadmap” for the future
- A lifelong relationship with your Investment Advisor

## Expertise

- Canada’s leader in wealth management
- The RBC Wealth Management Services team of accredited estate, tax and financial planning specialists
- Leading research for domestic and global markets, including RBC Capital Markets
- Objective and independent investment insights through the Global Portfolio Advisory Group

## Services

- Full brokerage service
- Investment management
- Discretionary services
- Personalized financial planning
- Simplified tax reporting
- Enhanced client reporting
- Tax, estate and business succession planning
- Intergenerational wealth planning

## Awards and recognition

- #1 Bank-Owned Dealer – *Investment Executive* Brokerage Report Card, 2022
- Best Innovative Client Solution (North America) – Family Wealth Report Awards 2021
- Outstanding Global Private Bank (North America) – Private Banker International Global Wealth Awards 2021
- Best Private Bank, Digitally Empowering Relationship Managers (North America) – PWM Wealth Tech Awards 2021
- 2021 Catalyst Award Winner (Global) – Catalyst Awards 2021

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