The Wealth Management Approach

SOLUTIONS FOR HEALTH CARE PROFESSIONALS

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Your roadmap for the future

We understand that Health Care Professionals have unique and complex financial situations. Our wealth management approach is designed for busy doctors, dentists, pharmacists, veterinarians and other medical professionals who require professional assistance managing their wealth.

Wealth Management is a comprehensive approach to helping you achieve your financial and life goals. It extends beyond investment advice and money management to encompass lifestyle protection, retirement planning, intergenerational wealth transfer and legacy creation. It provides the confidence to make sound financial decisions, plus the freedom to live life as envisioned. It also provides a clear roadmap for the future by addressing all financial aspects at each life stage.

We can help health care professionals who:

- Have reached the stage where they can truly benefit from a much wider range of sophisticated investment and wealth management options
- May have outgrown the basic financial services offered by their current industry association-sponsored investment provider
- Wish to have their multi-faceted financial affairs conveniently co-ordinated by a team of properly qualified wealth management specialists
- Wish to protect their income-earning ability – particularly during their peak earning years
- Would like to make higher tax-deductible contributions than their current retirement plan allows with a special pension plan only available to self-incorporated professionals
- Require more in-depth financial planning to uncover potentially significant wealth enhancement opportunities prepared by a fully accredited Financial Planning Specialist
- Are ready to explore succession-planning strategies to ensure a well-funded retirement and put their practice in capable hands

We will work with you and other professional advisors to address the financial opportunities and challenges you face. The result is a comprehensive wealth management plan tailored to your needs.

Comprehensive wealth management

What does a comprehensive wealth management plan include?

INVESTMENTS
- Customized investment strategy
- Risk management
- Ongoing review and rebalancing

FINANCIAL PLANNING
- Cash management
- Net worth statement
- Financial strategies

RETIREMENT PLANNING
- Savings strategies
- Tax-efficient income
- Business succession

TAX MINIMIZATION
- Tax-efficient investing
- Trusts
- Insurance

INSURANCE PLANNING
- Family financial security
- Living benefits
- Estate tax minimization

ESTATE PLANNING
- Estate document review
- Estate preservation
- Intergenerational wealth transfer

CHARITABLE GIVING
- Stock donations
- Life insurance
- Charitable foundations

Thank you for your interest in wealth management at RBC Dominion Securities. For more information, or to schedule an appointment, please contact us today at 780-944-7030 or elena.pucci@rbc.com to discover the benefits of a tailored comprehensive wealth management plan.