Who We Are

At RBC Dominion Securities, we have been helping individuals, families, businesses and other organizations achieve their financial goals since 1901. Today, we are Canada's leading provider of wealth management services, trusted by more than 400,000 clients globally. Investment Advisor Elena Pucci provides expert advice on all aspects of managing your wealth – everything from building it to protecting it for the future. Services range from investment advice and money management to financial and estate planning.

WHO WE CAN HELP

Our services are designed for clients who have reached the stage where their financial affairs have become increasingly complex and they require professional assistance managing their investment assets. Our clients include:

- Busy executives and professionals looking to free their time to focus on personal and career goals
- Successful business owners and self-employed professionals who need help managing personal and business assets
- Pre-retirees who want to make the most of their retirement savings as they approach retirement
- Retirees requiring innovative strategies to maximize their after-tax retirement income, while protecting their financial security
- Well-established families seeking professional guidance transferring wealth to the next generation in a tax-efficient manner
- Philanthropists looking for creative ways to enhance their legacy to chosen charities
- Non-profit organizations requiring assistance managing investment assets according to specific guidelines

Elena Pucci, CIM, FCSI
Investment Advisor

Elena offers a wealth of experience as your Investment Advisor. She has 20 years of financial services industry experience, including 16 with RBC Dominion Securities.

In addition, Elena has achieved several industry designations including the Canadian Investment Manager (CIM) and Fellow of the Canadian Securities Institute (FCSI). She is also licensed to provide insurance strategies to preserve their wealth. Her commitment to education ensures that clients have the highest level of knowledge and the most current strategies for their portfolios.

Elena prides herself on the trust clients place in her. She takes the privilege of helping clients very seriously. That's why she takes a disciplined approach to investing that focuses on minimizing risk while building wealth over the long-term.

INVESTMENT SOLUTIONS DESIGNED FOR YOU

The starting point for achieving your investment goals is a personalized strategy. Several important factors will be considered in the creation of your strategy – such as your personal investment goals, how long you have to invest, and your attitudes toward risk. Based on this, we will recommend guidelines for making investment decisions – including security selection and asset mix criteria. Over time, your plan will evolve to keep pace with your changing needs and will be adjusted to reflect current market conditions.

HELPING YOU MAKE INFORMED DECISIONS

Research

To help provide you with well-informed advice, we have access to research from several leading firms.

- Industry-leading RBC Capital Markets covers close to 700 companies in all major industry sectors in North America
- Independent Veritas provides in-depth reports on major Canadian companies exclusively to RBC Dominion Securities
- Several leading U.S. investment firms like Standard & Poor's offer coverage of companies around the world

Portfolio strategy

Making sense of today's ever-changing financial markets isn't easy. But having the right perspective on where the markets are going – and how that affects your portfolio – is essential to succeed as an investor.

Helping Elena provide the perspective you need is RBC Investment Strategy Committee. This leading strategy group is comprised of our senior economists, portfolio strategists and research analysts. After considering investment research and economic analysis, the Strategy Committee makes recommendations on portfolio structure for the coming 12 months, including:

- The optimum mix of stocks, bonds, and cash
- Suggested term for fixed-income investments
- A "focus list" of top-ranked Canadian stocks collectively expected to outperform the benchmark TSX

Focusing On The Big Picture

Getting the right investment advice is a key part of managing your wealth. But it's just one part of a bigger picture. You may also require assistance with your finances or taxes, help planning your retirement, or guidance on how to structure your estate in a tax-efficient manner. Perhaps you have very specific concerns that need to be addressed – like maximizing your retirement income or deciding how to pass on the family business.

Because these various aspects of managing wealth are all interconnected, it is important to take a coordinated approach. We can help you address all your wealth management concerns, working in partnership with your tax and legal advisors. We also offer several wealth management services, including financial planning, estate consultation and wealth protection.

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