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## OUR COMPLIMENTARY REFERRAL/REVIEW SERVICE

With all the uncertainty in the markets, many people are understandably concerned about their investments.

Increasingly, clients are asking us if we would sit down with a friend, neighbour or family member to go over their investment portfolio. Sometimes, they just want an objective “second opinion” to make sure they are on-track with their current advisor. Other times, they are actively seeking a new advisor and would like to know more about what we can offer. Whatever the situation, we would be pleased to sit down with anyone you refer to us and provide a confidential review at no obligation or cost.

### OUR REVIEW PROCESS FOLLOWS FOUR KEY STEPS:

1. First, we listen to understand their needs and concerns.
2. Then, we document their investor profile, including their comfort level with risk and why they are investing.
3. Next, we review their current investment holdings based on our three research disciplines and current outlook for the economy and markets.

4. Finally, we prepare a detailed written report containing our recommendations. We may suggest anything from minor adjustments to wholesale changes. We may also extend an invitation to them to join us as a client or perhaps recommend one of our colleagues at RBC. Or, as we often do, we may simply confirm that they are on-track and recommend they continue working with their current advisor.

### THE RESULT IS ONE OF TWO THINGS:

They gain peace of mind knowing they are on-track – or they gain the confidence of knowing exactly what they need to do to get back on-track.

*To enquire about our Complimentary Review Service for your friends and family, please contact us.*



**RBC Wealth Management**  
Dominion Securities