



Tax-efficient wealth management for your medical professional corporation

Portfolio Manager J. Todd Kennedy has the expertise and resources to help you build wealth more tax-efficiently.

Sophisticated investment solutions

Instead of putting your hard-earned money into basic GICs, bonds and savings accounts or mutual funds, Todd can help you:

- Invest directly in equities with a custom-built and managed portfolio
- Enhance returns with tax-minimizing strategies, including tax-deductible investment management fees
- Graduate to discretionary investment portfolios that leave the day-to-day investment details to the professionals

Tax-efficient wealth management strategies

In addition to investments, Todd can help you:

- Boost your retirement savings while creating tax-minimizing opportunities for your practice with Retirement Compensation Arrangements (RCAs) or Individual Pension Plans (IPPs)

- Protect your income-earning ability with tax-exempt insurance solutions
- Distribute tax-efficient dividends to shareholders of your incorporated practice
- Ensure the Canada Revenue Agency is not your biggest beneficiary

Wondering if you should call us?

1. Do you have a separate Will for your medical professional corporation? ☐ Yes ☐ No
2. Do you have or will have excess cash in your medical professional corporation? ☐ Yes ☐ No
3. Is your practice paying the maximum tax on interest income or foreign dividends? ☐ Yes ☐ No

If you answered "Yes" to any of the above questions, contact us today to arrange a complimentary consultation.

Kennedy Wealth Management of RBC Dominion Securities
J. Todd Kennedy, CIM, FCSI | Portfolio Manager
 613-566-4582 | todd.kennedy@rbc.com | www.toddkenedy.ca

Professional Wealth Management Since 1901



RBC Wealth Management
 Dominion Securities