Wealth Management
Dominion Securities

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Integrated wealth management planning for you and your family

The PFP Group of RBC Dominion Securities

Our team is uniquely positioned within RBC® to offer not only top-quality investment solutions but also comprehensive wealth management services to help you achieve your goals while relieving you of the ongoing day-to-day burden of managing your finances.

Our clients

Our clients are typically business owners, professionals, and high-net-worth families, who are building, preserving or transferring wealth. Through your relationship with our team, you benefit from the full spectrum of tailored financial and wealth management solutions to help meet your long-term goals.

A team approach to integrated wealth management

The PFP Group of RBC Dominion Securities includes your personal Portfolio Manager, dedicated Associates to provide an outstanding client experience, as well as an extended team of wealth management specialists.

Together, our group provides the preferred care and responsive service you require through personal relationships, industry-leading professional partnerships and a unique service offering that is constantly evolving to bring you the most innovative wealth management solutions available.

Putting the pieces in place

When the many facets of your family, career and personal life are competing for your time and attention, we are there to keep a watchful eye on your overall wealth management strategy. We understand that investment management is just one key part of a well-rounded wealth plan. To that end, we offer complimentary financial plans and wealth consultations through our industry-leading RBC Wealth Management Services team. In addition, to ensure proper coordination, we work in consultation with your other trusted advisors, such as accountants, lawyers and private bankers.

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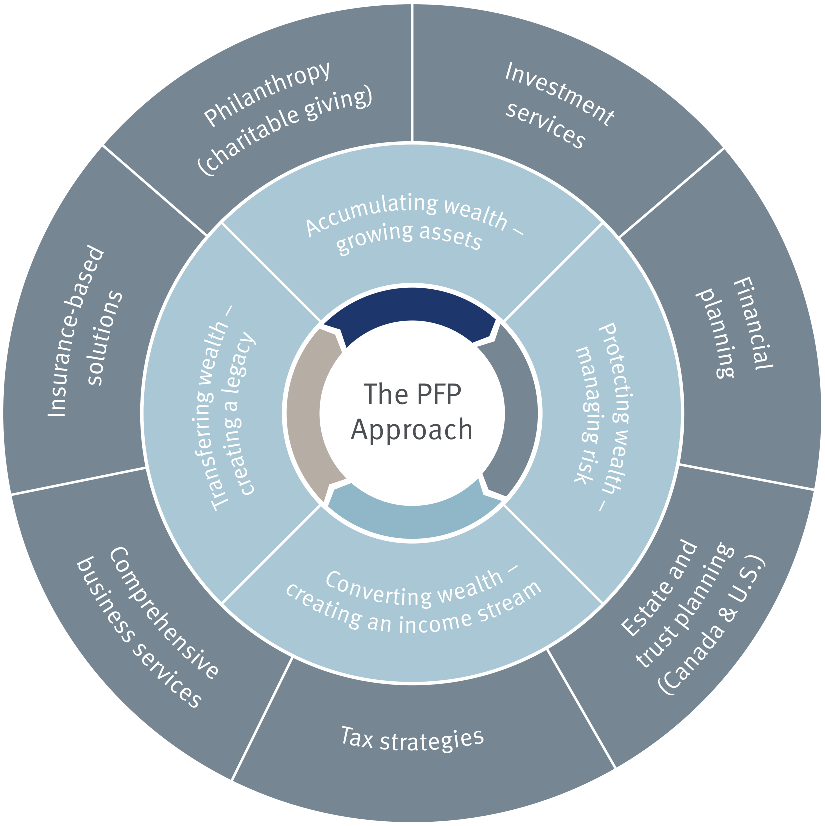

Investment services

We provide independent advice on the complete universe of investment solutions to build a fully customized portfolio designed to meet your needs and preserve your capital.

Financial planning

To help you see your "financial big picture" more clearly we create a personalized financial plan that sets specific financial goals and identifies opportunities to optimize your wealth.

Estate and trust planning

You've worked hard to build your legacy and we can help ensure it passes to your heirs tax and cost efficiently. We take a family approach, and can help you ensure your heirs are well-prepared to receive their inheritances and continue your legacy.

Tax strategies

To minimize the impact of taxes we consider tax-efficient investment strategies, and coordinate closely with your trusted tax advisors.

Comprehensive business services

From investing surplus capital to planning your exit strategies, we can help you make the most of your business assets.

Insurance-based solutions

Because your family's financial security is important, we offer a range of insurance-based solutions designed to preserve – and enhance – wealth.

Philanthropy

We offer convenient, tax-efficient charitable-giving solutions so you can make a bigger difference.

Five-step wealth management process

We follow a disciplined five-step process in order to provide comprehensive wealth management.

1. Introduction – We introduce you to our wealth management services during an initial meeting and on an ongoing basis as your needs evolve.

2. Discovery – Then, we gain a deeper understanding of your individual needs, goals and circumstances to help clarify financial objectives. This includes gathering together important financial information, such as statements.

3. Strategy – Next, we analyze your information and objectives and, based on our understanding of your needs and our extensive experience, match them with effective strategies.

4. Solutions – We develop specific solutions, tailored to your distinct needs, drawing from the complete universe of world-class products and services.

5. Services – We regularly review your wealth management plan to ensure it continues to meet your needs in light of your evolving circumstances, as well as changing market and economic conditions.

Thank you for your interest in professional wealth from the PFP Group of RBC Dominion Securities. For more information, please contact us today.