## RBC Dominion Securities Inc.



# THE WEALTH MANAGEMENT PROCESS



PATRICIA MOSDELL Investment Advisor, FCSI, CSWP

5140 Yonge St. Suite 1100 North York ON M2N 6L7 Phone: 416-733-5105 Fax: 416-733-5250 Email: patricia.mosdell@rbc.com

www.patmosdell.com

## **1. DISCOVERY**

Your personal advisor sits down with you to gain a clear understanding of your goals both personal and financial.

#### **2.** FINANCIAL PLANNING

We will prepare a customized analysis of your financial situation incorporating your financial goals, risk tolerance and long-range plans.

#### **3. WILL & ESTATE REVIEW**

We can help you address your various estate planning concerns and recommend the steps you need to take to achieve your goals.

#### 4. INSURANCE REVIEW

Our insurance specialist can help you protect everything you have worked so hard to build through innovative insurance-based strategies.

#### **5.** INVESTMENT POLICY STATEMENT (IPS)

Your advisor creates a customized IPS, which is the blueprint for your investment portfolio.

### **6.** Investment Proposal

Before implementation, your objectives will be reviewed and we will outline an investment plan created for you. Once approved, the recommendations are put into place.

#### 7. ONGOING SERVICES

You are apprised of the performance of your portfolio and the markets through regular updates.

#### 8. REGULAR REVIEWS

As your needs and the markets evolve, periodic reviews ensure that your plan remains an effective tool in achieving your objectives.





#### **RBC Wealth Management** Dominion Securities

#### There's Wealth in Our Approach.™

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