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.™

RBC Dominion Securities Inc.* and Royal Bank of Canada are separate corporate entities which are affiliated. *Member-Canadian Investor Protection Fund. RBC Dominion Securities Inc. is a member company of RBC Wealth Management, a business segment of Royal Bank of Canada. Insurance products are offered through RBC Wealth Management Financial Services Inc., a subsidiary of RBC Dominion Securities Inc. When providing life insurance products in all provinces except Quebec, Investment Advisors are acting as Insurance Representatives of RBC Wealth Management Financial Services Inc. In Quebec, Investment Advisors are acting as Financial Services are a financial Services Inc. In Quebec, financial Services Inc. Mich is licensed as a financial services firm in that province. In the rest of Canada, Insurance are available through RBC Dominion Securities Inc. ®Registered trademarks of Royal Bank of Canada. Used under licence. ©2013 Royal Bank of Canada. All rights reserved. IFWMP-EN (11/2013)