The Wealth Management Process

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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.™