



WEALTH MANAGEMENT SERVICES FOR U.S. CITIZENS LIVING IN CANADA



CHARLES W. CULLEN III, CFP, CIM

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As a U.S. citizen, your financial needs are complex. Investment Advisor Charles W. Cullen III can carefully manage and simplify your wealth so you can focus on what's important.

Services include:

- Working with U.S. based advisors to deliver advice appropriate to you
- Investment approach that manages U.S. tax issues in coordination with your accountant
- An asset allocation for Canadian-based assets in light of retirement investments in U.S.
- Transferring U.S. pensions (IRA, 401(k), etc.) to Canadian RRSPs
- Coordinating wealth management with existing advisors (American and Canadian lawyers, and accountants)
- Access to extensive cross-border professional network
- Comprehensive financial planning
- Family wealth management

ABOUT CHARLES W. CULLEN III

Charles has over a decade of experience in financial services, most recently as a senior vice president at a U.S. wealth management firm. Charles is a graduate of Princeton University (with honours).

As a U.S. citizen who moved to Nova Scotia, Charles understands the unique financial considerations you face and has the specialized wealth management strategies to help you achieve your goals. You can count on Charles and RBC Dominion Securities to help you with your complex financial life.

ABOUT RBC DOMINION SECURITIES

Since 1901, Canadians have trusted RBC Dominion Securities to manage their complete financial picture. Today we are trusted by over 400,000 clients worldwide. RBC Dominion Securities is part of RBC, Canada's largest bank and the 11th-largest bank globally based on market capitalization.

If you require a qualified professional with the resources and the experience to help you address your unique financial situation, or simplify your complex wealth management, contact Charles today for a complimentary consultation.



RBC Wealth Management
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There's Wealth in Our Approach.™