Coordinating your affairs to simplify your financial life

What does a comprehensive wealth management strategy include?

FINANCIAL PLANNING

- Clarify your financial goals
- Create a net worth statement
- Recommend planning strategies

INVESTING

- Custom-design your portfolio based on your needs for income, growth and security
- Diversify to manage risk and achieve return objectives
- Review and rebalance on an ongoing basis

TAX PLANNING

In consultation with your tax advisors, we can help you identify tax-minimizing strategies that can:

- Protect your wealth
- Enhance your after-tax retirement income
- Minimize estate taxes

CHARITABLE GIVING

- Help you create an enduring family legacy

RETIREMENT PLANNING

- Maximize retirement savings and income
- Coordinate transition into retirement
- Assist with business succession

ESTATE PLANNING

- Identify opportunities to protect your estate for your family
- Help simplify estate settlement

EDUCATION

- Assist with tax-advantaged strategies to fund a family member's education

INSURANCE PLANNING

- Protect your financial security
- Enhance your after-tax wealth
- Minimize impact of estate taxes

CREDIT & LENDING

We can introduce you to an RBC banker to assist with:

- Cash flow management
- Personal credit and lending
- Business financing and leasing

Contact us today to explore how we can build your personal wealth management plan today.

Professional Wealth Management Since 1901

RBC Wealth Management
Dominion Securities