RBC WEALTH MANAGEMENT

Jason Fong, B.Comm., CA

Financial Planning Specialist
RBC Wealth Management Services

Jason is a Chartered Accountant (CA). He holds a Bachelor of Commerce degree from the University of British Columbia and has completed all three levels of the Canadian Institute of Chartered Accounts' In-Depth Tax Course.

Coming from one of the major global accounting firms, Jason brings a broad range of experience to his role as a Financial Planning Specialist. In his previous role, his work included tax minimization through appropriate tax planning (corporate and personal) and business restructuring. Jason's client base included high-net-worth individuals, private companies, trusts and partnerships.

As a Financial Planning Specialist, Jason's role is to work with and support your advisor in preparing and presenting your Compass Financial Plan and to identify and assess any related financial, tax and retirement planning concerns you might have.

Specialized Financial Planning

At RBC, we recognize that with greater financial resources, comes greater financial complexity. To help you properly coordinate your financial matters and optimize the unique opportunities available to you, we are pleased to offer you our highest level of financial planning. Personally prepared by Jason, a Financial Planning Specialist, your comprehensive Financial Plan will provide recommendations specific to your situation. Your plan will consider strategies to maximize your cash flow, reduce taxes, ensure your retirement lifestyle, protect your financial security, transfer wealth to next generation tax-efficiently and make the most of your philanthropic legacy. In appreciation of your business, your advisor is pleased to offer this service to you on a complimentary basis.

To schedule a meeting with Jason Fong, please contact your advisor.

RBC Wealth Management

There's Wealth in Our Approach.™