



**KELLY KOTELLO, B.Comm., CA**  
**Financial Planning Specialist**  
**Wealth Management Services**

## Introducing Kelly Kotello Financial Planning Specialist

Kelly is a Chartered Accountant (CA) with over ten years of post designation experience. Kelly completed her Bachelor of Commerce degree (major in Accounting) at the Haskayne School of Business at the University of Calgary. She has also completed Level 1 and 2 of the CICA In-Depth Tax Course.

Prior to joining RBC, she was a tax manager at one of the leading international public accounting firms. Kelly specialized in providing tax preparation and tax planning to individuals, owner managers, corporate and high net worth clients.

Kelly's role is to work with and support your advisor in preparing and presenting comprehensive Compass Financial Plans.

### 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 Kelly, 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 Kelly Kotello, please contact your advisor.**



**RBC Wealth Management**