Personal Values Discovery Process

What Is Truly Important To You?

Your Story

A successful financial advisory relationship must be built on a strong foundation of trust. In our initial meetings, I will listen carefully to your objectives and goals to recognize which areas of your life are most important to you. As everyone is unique, there can be no all-encompassing rule for portfolio structures – I will help you realize financial success through a highly personalized approach.

Your Strategy

With an understanding of your objectives in mind, solutions will be proposed that work to best suit your intentions. I will work with you, your personal advisors and a number of qualified professionals at RBC Dominion Securities to design an effective all-encompassing strategy to build and preserve your wealth. Employing the resources of Canada's leading provider of wealth management services, your strategy will be built on leading investment solutions, money managers and analysts.

Your Results

I will review your progress on a timely basis to ensure that the results are in line with your objectives. We will meet on a regular basis to review these results.

My Pledge

I will continually monitor your investment plan to ensure that the solutions in place remain appropriate.

The Road Ahead

My wealth management solutions include the expert advice of RBC Dominion Securities' top performing specialists. With vast amounts of experience in a variety of fields including retirement planning, insurance, will and estate planning, taxation planning, etc. I am confident that together we will exceed your expectations in service and help you achieve the financial security you seek.

DR. PATRICK O'BRIEN, DVM | *Investment Advisor*

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