The Wealth Management Process

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Comprehensive wealth management solutions

Put the resources and expertise of Canada's largest provider of wealth management services to work for you. Please call today to learn how we can help you grow, manage and protect your wealth.

DISCOVERY

Your personal advisor sits down with you to gain a clear understanding of your goals – both personal and financial.

FINANCIAL PLANNING

We will prepare a customized analysis of your financial situation incorporating your financial goals, risk tolerance and long-range plans.

WILL & ESTATE REVIEW

We can help you address your various estate planning concerns and recommend the steps you need to take to achieve your goals.

INSURANCE REVIEW

Our insurance specialist can help you protect everything you have worked so hard to build through innovative insurance-based strategies.

INVESTMENT POLICY STATEMENT (IPS)

The blueprint for your investor profile, the construction of your portfolio and customized Investment Policy Statement.

INVESTMENT PROPOSAL

Before implementation, your objectives will be reviewed and we will outline an investment plan created for you. Once approved, the recommendations are put into place.

ONGOING SERVICES

You are apprised of the performance of your portfolio and the markets through regular updates, client events, newsletters and our website.

REGULAR REVIEWS

As your needs and the markets evolve, periodic reviews ensure that your plan remains an effective tool in achieving your objectives.

Professional Wealth Management Since 1901

RBC Wealth Management
Dominion Securities