



FAMILY WEALTH MANAGEMENT

Ten strategies to build and protect your family's wealth

RBC DOMINION SECURITIES INC. FINANCIAL PLANNING PUBLICATIONS



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INTRODUCTION

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FAMILY WEALTH MANAGEMENT

Most Canadians don't consider themselves "wealthy" – even when they have a relatively high net worth and own million-dollar investment portfolios. Surveys of Canadian millionaires reveal a modest attitude towards wealth, with most respondents viewing themselves as financially secure, rather than wealthy.

Regardless of how you view your financial status, there are some unique financial planning issues and strategies that you should consider when you have \$1 million or more in investment assets.

In this guidebook, we highlight 10 strategies that can help you protect your assets, reduce taxes, plan for retirement and maximize your estate. Together with your tax, legal and investment advisors, you can determine which strategy or strategies, explained on the following pages, make sense for you and your family.

This guidebook assumes you and your family are Canadian residents and not U.S. citizens or U.S. green card holders.

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