RBC WEALTH MANAGEMENT FINANCIAL SERVICES INC.

Suzanne Schultz, CA, CFP

Estate Planning Specialist

Suzanne Schultz is a Chartered Accountant and Certified Financial Planner with a specialty in tax and estate planning.

As an Estate Planning Specialist for RBC, she uses her knowledge of corporate and personal tax to develop personalized insurance solutions to meet the needs of business owners, highly taxed investors, affluent families and other clients. Prior to joining RBC in 2006, Suzanne was the Associate Vice-President of the Tax and Estate Planning Group of one of Canada's leading multi-family office firms. She was previously a Tax Manager at one of the largest professional services companies where she completed her CA designation with an honour roll placing, and completed the CICA In-depth Tax Course. She has taken numerous courses on tax and estate planning, including masters level courses on U.S. taxes.

Suzanne is the co-author of 78 Tax Tips for Canadians for Dummies, host of the HGTV series House Poor and has been a regular guest on the Business News Network. She has written articles and contributed towards publications for the Globe and Mail, National Post, Toronto Star and Hamilton Spectator.

Suzanne's areas of expertise include the use of insurance for personal and corporate tax planning, wealth preservation, financial planning, estate planning (including U.S. estate tax) and charitable giving.

Comprehensive Insurance Planning

Working closely with your advisor, Suzanne employs a comprehensive process to assess your wealth management needs and then recommends creative, tax-exempt insurance strategies to help address them. For more complicated situations, she works with your other professional advisors in the development of appropriate solutions.

Suzanne Schultz can focus on both personal and corporate insurance solutions to help increase your net worth, reduce the impact of taxation and secure your wealth through a variety of life insurance, annuity, and living benefits solutions. She can also assist you in structuring your insurance contracts to ensure your wealth is transferred to your heirs in accordance with your wishes. To help you receive high-quality, cost-effective insurance solutions, Suzanne evaluates various insurance offerings from Canada's top-ranked insurance providers.

To schedule a complimentary meeting with Suzanne Schultz, please contact your advisor.

Charmaine Tan
Estate Planning Associate

RBC Wealth Management

There's Wealth in Our Approach.™