RBC WEALTH MANAGEMENT

SUSAN MACDONALD, STI, MTI

Estate and Trust Advisor
RBC Wealth Management Services

RBC Wealth Management

As an Estate and Trust Advisor, Susan Macdonald has been serving clients throughout Western Ontario for over two decades. Susan has continued to deepen her knowledge and expertise with key industry designations such as Member, Trust Institute and Trust Institute.

Susan works with individuals, families and businesses to provide customized estate, trust and incapacity solutions. Whether it is helping someone to settle an estate, establishing a trust to ensure the successful transfer of family assets, or arranging to assist with the administration and responsibilities for a Power of Attorney, Susan can help.

With more than two decades of industry experience, Susan brings to each client the necessary skill set to provide both the technical expertise as well as the genuine understanding of the emotional complexities that underlie these issues. We understand that no two clients are the same and so together with our RBC Estate & Trust Services partners, we can find the solution that's right for you.

Thank you for your interest in RBC Wealth Management. To schedule an appointment with Susan Macdonald, please contact your RBC advisor.

RBC Wealth Management

Who We Can Help

Supported by RBC Estate & Trust Services partners, an Estate and Trust Advisor provides services that are designed to provide you and your family, professional solutions to meet your particular needs.

We can help individuals who wish to appoint RBC Estate & Trust Services to act as Executor, Trustee or Power of Attorney as they:

- Want an objective, unbiased and professional advisor to deal with complex and challenging family dynamics
- Feel the process is too complex and burdensome for their family or friends
- Have no suitable family or friends to act or those with minor children
- Wish to maintain confidentiality in their financial affairs

In addition, we can help individuals who have been appointed or are currently acting as Executor, Trustee or Power of Attorney as they:

- Lack the time, expertise or desire to act and carry out their duties but still want to retain their decision making authority
- Want or need assistance fulfilling some or all of their duties
- Live outside of the province or country and know that their physical presence may be required to fulfill some of their duties
- Are professionals (lawyers, accountants) who want specialized technical support or trust accounting behind the scenes on behalf of their clients

Who We Are

RBC Estate & Trust Services has been serving Canadians since 1899. We provide individuals, families and businesses with valuable estate, trust and incapacity services, tailored to their specific needs. Our clients are often dealing with unique and complex issues, and want a personal relationship with a skilled advisor who can deliver tailored, thoughtful solutions.

We Offer Our Clients:

- Assistance in the preservation, management and transfer of wealth between generations by providing solutions to implement clients' estate and trust plans
- Financial security and peace of mind to elder Canadians who require assistance in the management of their affairs as they grow older
- Professional and impartial expertise in delivering estate and trust services
  - Strong history and legacy in managing fiduciary businesses
  - Professionals who have technical and practical experience
  - Compassion and understanding of the client's/family's experience