RBC WEALTH MANAGEMENT

Craig Dale, B.Com. (Hons), CA

Financial Planning Specialist
RBC Wealth Management Services

Craig is a Chartered Accountant and holds a Bachelor of Commerce (Honours) degree from Queens University and has completed and tutored the CICA In-Depth Tax Courses.

In his previous role as a tax manager at one of the leading international accounting firms, Craig specialized in developing and implementing tax planning strategies for high net worth individuals, their owner managed entities and family trusts with a focus on succession and estate planning. Craig has also assisted with the tax planning for corporate sales, acquisitions, and reorganizations.

Craig's role as a Financial Planning Specialist is to work with and support your advisor in preparing and presenting your comprehensive Compass Financial Plans and to identify and assess any related financial and tax planning concerns you might have.

Specialized Financial Planning

At RBC, we recognize that with greater financial resources, comes greater financial complexity. To help you properly coordinate your financial matters and optimize the unique opportunities available to you, we are pleased to offer you our highest level of financial planning. Personally prepared by Craig, a Financial Planning Specialist, your comprehensive Financial Plan will provide recommendations specific to your situation. Your plan will consider strategies to maximize your cash flow, reduce taxes, ensure your retirement lifestyle, protect your financial security, transfer wealth to next generation tax-efficiently and make the most of your philanthropic legacy. In appreciation of your business, your advisor is pleased to offer this service to you on a complimentary basis.

To schedule a meeting with Craig Dale, please contact your advisor.

RBC Wealth Management

There's Wealth in Our Approach.™