

Ivan Luo Wealth Management Group

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A comprehensive approach to building and protecting wealth

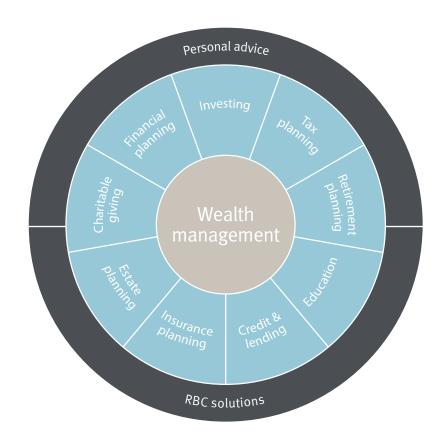
To help you meet your various goals, we take a comprehensive approach that extends beyond investing to encompass lifestyle protection, retirement planning, intergenerational wealth transfer and legacy creation. With the expert support of our industry-leading RBC Wealth Management Services team, we can help you address your specific financial, tax, retirement and legacy planning concerns.



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Coordinating your affairs to simplify your financial life

Investing Financial planning • Custom-design your portfolio Tax planning based on your needs for income, growth and security • Clarify your financial goals In consultation with your tax advisors, we can help you identify · Create a net-worth statement · Diversify to manage risk and tax-minimizing strategies that can: achieve return objectives Recommend planning Protect your wealth • Review and rebalance on an strategies ongoing basis • Enhance your after-tax retirement income Minimize estate taxes Estate and legacy planning Retirement planning • Identify opportunities to Maximize retirement savings What does protect your estate for and income a comprehensive your family Coordinate transition into wealth management • Help simplify estate settlement retirement strategy include? Assist with business · Help you create an enduring family legacy succession **Education** Insurance planning Credit and lending • Protect your financial security · Assist with tax-advantaged strategies to fund a family • Enhance your after-tax wealth We can introduce you to an member's education Minimize impact of RBC banker to assist with: estate taxes · Cash flow management Personal credit and lending Business financing and leasing