



Wealth Management
Dominion Securities



McRae Wealth Management Group
of RBC Dominion Securities



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Personal customized portfolios

An investment boutique within a larger firm

This is a premium level of customized portfolio management services offered by a small elite group of portfolio managers within RBC Dominion Securities who have been individually approved based on advanced investment credentials and extensive experience. As your personal Portfolio Manager I will work with you to build a customized portfolio from the ground up based on your individual needs for growth, income, risk tolerance and tax efficiency.

Why choose this service?

As you enjoy greater success in life, your financial affairs will invariably become more complex and demand more of your time, which you would prefer to devote to your other interests and responsibilities. This process will give you the freedom to delegate the management of your investment portfolio with confidence. It is a careful process involving robust investment management guidelines, checks and balances, and formal reviews, to ensure that your portfolio is being managed to the highest standards of ethics and professionalism.

The benefits of this service to you are:

- All portfolios, regardless of size, get equal attention. We are able to take advantage of investment opportunities quickly and efficiently because your prior approval is not required. If we feel a stock is to be bought or sold it will be done for all accounts at the same time and at the same price.
- Faster trade execution. You also never miss an opportunity simply because you are out of reach. Having this flexibility allows us to keep our best ideas in the portfolio at all times and also gives us the ability to tactically re-balance the portfolio by individual positions as well as getting in and out of sectors as the market cycles change. We handle all the details of portfolio management and monitoring on a daily basis and since we are able to execute on an idea quickly and efficiently when it presents itself, this could potentially lead to better returns.
- Third-party review and monitoring. To ensure that your account is being managed according to the guidelines established during the portfolio building process, an independent risk management



You can be confident that your investments will be managed according to the highest standards.

group within RBC in Toronto reviews your account on a regular basis to ensure we stay within those guidelines as specified in your written Investment Policy Statement.

- Enhanced comprehensive reporting. You will always have direct access to me through face-to-face meetings, and phone calls. In addition to that, and your standard monthly statements, you will be receiving a comprehensive quarterly report detailing your current asset mix, current positions, geographic allocation and rate of return information.

Achieve your goals with confidence

With this portfolio management process, you can be confident that your investments will be managed according to the highest standards. We work together with an extensive team of RBC Dominion Securities research analysts who support us with:

- Investment strategy and research
- Management of risk and capital preservation

Meet the team at www.mcraewealthmanagement.com

This premium customized portfolio service could be ideal if you:

- Desire superior, personalized service and direct access to a professional Portfolio Manager.
- Want freedom from making daily investment decisions
- Seek a disciplined approach to professional wealth management

The RBC Portfolio Monitoring Group monitors the portfolio for alignment with our investment management guidelines and the preferences, constraints and other unique directives set out in your customized Investment Policy Statement.

To learn more about this service please feel free to call Wayne McRae directly.