RBC Dominion Securities Inc.

Evans Wealth Management Group of RBC Dominion Securities

Wealth Management
Dominion Securities

Discover a wealth
of possibilities.

Evans Wealth Management Group of RBC Dominion Securities

Wherever your journey takes you, we're beside you every step of the way

Since 1901, RBC Dominion Securities has provided trusted advice and wealth management solutions to individuals, families, businesses, institutions and charitable foundations. Our commitment to our clients has enabled us to build strong relationships that stand the test of time and transcend generations.

At Evans Wealth Management Group of RBC Dominion Securities, we build trust and confidence by understanding what's important to you: whether it's the success of your family, your career, your business or other organization, or the legacy you want to leave to the world. That's where we begin, by getting to know you and working together to build your roadmap for the future.

We'll help you realize your vision with personalized wealth management strategies and customized solutions that draw on our global expertise, insight and extensive network of resources. And we'll keep you informed of your progress along the way, so you always know exactly where you stand.

Forward-looking and committed to building prosperity – Evans Wealth Management Group of RBC Dominion Securities strives to be the partner you can depend on to help you achieve your financial goals. But we're not just helping you build wealth. We're helping you build the life you want – for you, your family and the causes important to you.

Putting you first with a team approach

As a client of Evans Wealth Management Group of RBC Dominion Securities, you will receive timely service and professional advice through our team approach. Our team members focus on different areas of client service, so you get the expert assistance you need, when you need it.

Daniel Evans, B.Comm., CIM
Investment Advisor
306-956-7802 | daniel.evans@rbc.com

Daniel has been helping clients achieve their financial goals for over 10 years. He harnesses his broad expertise and industry credentials to provide high-quality, holistic wealth planning to high-net worth individuals, small business owners, farming families and institutional clients.

Daniel holds his Chartered Investment Manager (CIM) designation, Derivatives Fundamentals and Options License (DFOL) and Life Insurance License in addition to a Bachelor of Commerce degree from the Edwards School of Business. Daniel's education and experience ensure he is well-equipped to address our clients' wide-ranging needs.

Outside of the office, Daniel enjoys staying active in his community, having worked with a number of not-for-profit and charitable organizations over the years. Daniel is an active member of the Kinsmen Club of Saskatoon, as well as Treasurer for the Gasper Family Foundation.

Daniel lives in Saskatoon with his wife, Brittany and daughters, Halle and Harper. In his spare time, Daniel loves spending time with family and friends and relaxing at the family cabin in the summer. He also enjoys golf, downhill skiing, curling and hockey.

Kaitlyn Zerr, B.Comm.
Associate Advisor
306-956-5242 | kaitlyn.zerr@rbc.com

Kaitlyn joined RBC Dominion Securities in 2017 as a graduate of the Edwards School of Business, where she obtained a Bachelor of Commerce degree with a major in finance. A strong believer in ongoing education, she has completed multiple courses through the Canadian Securities Institute and is currently working toward a Certified Financial Planner designation.

A key member of the team, Kaitlyn is responsible for a variety of administrative tasks to ensure our office runs smoothly. She assists with the coordination of meetings and helps to prepare documents and information specific to each client's need. Kaitlyn provides our clients with attentive service and is recognized for her level of care.

Kaitlyn grew up in Saskatoon and lives with her boyfriend Jeff and their dog Lil. Outside of work she enjoys kickboxing, biking and watching the Maple Leafs with family during the winter months. Kaitlyn loves travelling within Canada and abroad, with her most memorable trip being to Italy where she taught English.

Jared Thompson, B.Comm.
Associate
639-220-0943 | jared.thompson@rbc.com

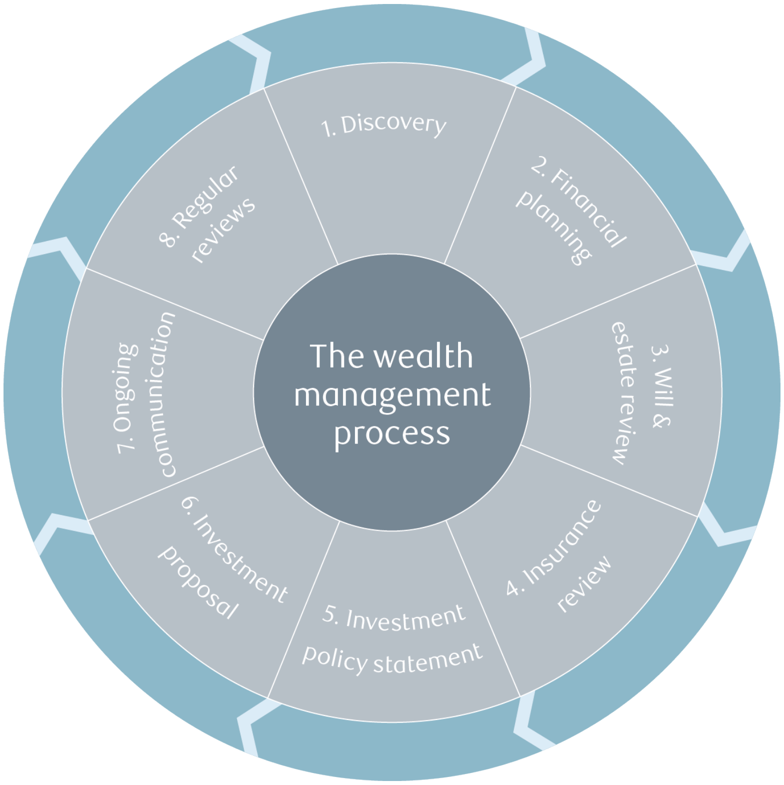
Jared joined RBC Dominion Securities after graduating from the University of Saskatchewan in 2021 with a Bachelor of Commerce degree in management. He became licensed as an investment representative in 2022 upon his successful completion of the Canadian Securities Course and Conduct and Practices Handbook through the Canadian Securities Institute.

Jared manages a diverse range of administrative duties, as he helps clients through the account opening process and regular account maintenance. He takes great pride in ensuring that our clients' on-going needs are fulfilled.

Outside of the office, Jared enjoys spending time with his family and friends. He stays active by playing baseball and golf in the summer and skiing at Big White in the winter. Jared's other passion includes aviation as he is a licensed Private Pilot.

Your roadmap for the future

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.



We follow a disciplined five-step process in order to provide a comprehensive plan that takes into account both your personal and financial goals. Your plan will be tailored to your unique objectives and can evolve over time to help ensure that it remains an effective tool to achieve your goals.

1. **Introduction** – we introduce the wealth management services we provide, not just during the first meeting, but on an ongoing basis as needs evolve and new services become available.
2. **Discovery** – we gain a deeper understanding of individual needs, goals and circumstances to help clarify financial objectives. This includes gathering together important financial information, such as account statements.
3. **Strategy** – next, we analyze financial and personal information to match objectives with smart, time-tested strategies.
4. **Solutions** – we develop thoughtful and creative solutions tailored to specific objectives, drawing from a wide selection of world-class products and services.
5. **Regular reviews** – as your needs and the markets evolve, periodic portfolio reviews help to ensure that your plan remains an effective tool to achieve your objectives.

Who we can help

It all starts with an investment in you.

We're here to help when you reach the stage where your financial affairs have grown increasingly complex – and you're looking for a trusted partner to take care of your financial matters, so you can focus on what's really important to you.

Our clients include:

- Busy executives looking to free their time to focus on personal and career goals.
- Successful business owners and self-employed professionals who need help managing personal and business assets.
- Pre-retirees who want to make the most of their savings as they approach retirement.
- Retirees requiring innovative strategies to maximize their after-tax retirement income while protecting their financial security.
- Well-established families seeking professional guidance transferring wealth to the next generation in a tax-efficient manner.
- Philanthropists looking for creative ways to enhance their legacies to chosen charities.
- Non-profit organizations requiring assistance managing investment assets according to specific guidelines.

Firm Resources

Wealth management services

Your investment portfolio is just one key part of your overall wealth management plan. 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, drawing on the expert support of the RBC Wealth Management Services team.

Financial Planning

We can provide a core financial plan suitable for most situations or, for more complex situations, an in-depth financial plan that leaves no stone unturned.

Will and estate consultation

For complex or high-value estates, a professional Will & Estate Consultant provides information on tax-efficient estate structuring. Following the consultation, a report outlining various estate-planning opportunities will be provided to explore in further detail, and potentially implement, with legal counsel.

Insurance assessment

A highly qualified Estate Planning Specialist assesses the need and suitability of tax-exempt insurance products to help create and enhance wealth, both today and in the future.

Strategic tax-minimization review

Working with our in-house tax specialists, we can review the effectiveness of particular investment strategies that may minimize or mitigate taxes.

Business owner planning

Our business owner specialists can develop an all-encompassing plan focused on a business owner's personal and corporate planning objectives. Strategies related to business risk, transition, succession, retirement, and tax are identified and evaluated to address planning needs.

High-net-worth planning

A high-net-worth planning specialist is available to discuss the specific concerns and opportunities that arise when dealing with above-average financial assets.

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RBC Dominion Securities
409 3rd Avenue South, Suite 1000
Saskatoon, SK, S7K 5R5

Toll-free: 1-800-785-4722
www.danielevans.ca

Thank you for your interest in wealth management at RBC Dominion Securities.

For more information, or to arrange a complimentary consultation, please contact our team today.

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