Wealth Management
Dominion Securities

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Your comprehensive financial plan

A personalized roadmap to your financial success

To help stay on track to achieve your important financial goals, such as minimizing taxes or planning for the eventual transfer of your estate, consider the benefits of a having a comprehensive financial plan created for you.

A comprehensive financial plan can address the following questions:

- Can I retire when I want to and still live my ideal retirement lifestyle?
- How can I ensure that I don't outlive my money?
- How can I minimize the taxes I pay each year?
- Is my investment mix appropriate?
- If I were to die unexpectedly, would my family be taken care of?
- How can I protect the value of my estate?

A customized, comprehensive financial plan should involve:

- An in-depth discovery discussion to ensure that your goals, aspirations and objectives are clearly identified
- A projection of your financial situation (investment, retirement and estate) based on your current strategies and savings rate
- Recommendations of key investment, tax, estate and retirement planning strategies that are aligned with your goals
- An action plan that summarizes the key recommendations and a clear guideline for you and your advisor to help monitor their implementation

Speak to us if you require more information about having a comprehensive financial plan prepared for you by one of our financial planning specialists. Depending on your situation, you may only require a simple financial plan to determine if you are on track for meeting your retirement goals.

RBC Dominion Securities Inc.