Wealth Management
Dominion Securities

Who we are

At RBC Dominion Securities, we have been helping individuals, families, businesses and other organizations achieve their financial goals since 1901. Today, we are Canada's largest provider of wealth management services[1], trusted by more than 400,000 clients globally. Our Investment Advisors provide professional advice on all aspects of managing your wealth – from building it to helping to protect it for the future. Services range from investment advice and money management to financial and estate planning.

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Who we can help

Our services are designed for clients who have reached the stage where their financial affairs have become increasingly complex and they require professional assistance managing their investment assets. Our clients include:

- Busy executives and professionals 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 who require 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

Investment solutions designed for you

The starting point for achieving your investment goals is a personalized strategy. Several important factors will be considered in the creation of your strategy – your personal investment goals, how long you have to invest and how comfortable you are with market risk. Based on this, we will recommend guidelines for making investment decisions – including security selection and asset mix criteria. Over time, your plan will evolve to keep pace with your changing needs and will be adjusted to reflect current market conditions.

Helping you make informed decisions

Portfolio strategy and research

Making sense of today's everchanging financial markets isn't easy. But having the right perspective on where the markets are going – and how they can affect your portfolio – is essential to succeeding as an investor.

The RBC Investment Strategy Committee, which is comprised of our senior economists, portfolio strategists and research analysts, provides additional insight and perspective to your Investment Advisor. After considering investment research and economic analysis, the Strategy Committee makes recommendations on portfolio structure for the coming 12 months, including:

- The optimal mix of stocks, bonds and cash
- Suggested terms for fixed-income investments
- A "focus list" of top-ranked Canadian stocks collectively expected to outperform the benchmark TSX

Your Investment Advisor also has access to research from several leading firms, including industry-leading RBC Capital Markets and independent Veritas exclusive to RBC Dominion Securities.

Focusing on the big picture

Getting the right investment advice is a key part of managing your wealth. But it's just one part of a bigger picture. You may also require assistance with your finances or taxes, help planning your retirement or guidance on how to structure your estate in a tax-efficient manner. Perhaps you have very specific concerns that need to be addressed – like maximizing your retirement income or deciding how to pass on the family business.

Because these various aspects of managing wealth are all interconnected, it is important to take a coordinated approach. Your Investment Advisor can help you address all your wealth management concerns.

Wealth management services

- Personal investment advice
- Portfolio management
- Discretionary money management
- Insurance solutions
- Financial planning
- Saving for education
- Retirement planning
- Maximizing your retirement income
- Will and estate planning
- Helping to protect your wealth
- Charitable giving
- Creating a legacy

Investment solutions

- Treasury Bills and commercial paper
- Guaranteed Investment Certificates (GICs)
- Government and corporate bonds
- Annuities[2]
- Commodity/financial futures
- Income and royalty trusts
- Preferred shares and common stocks
- Mutual funds
- Segregated funds[2]
- Investment pools
- Equity-linked notes

Please contact us for more information on how we can help you achieve your financial goals.

[1] Based on assets under management. Source: Investor Economics, Q2 2015. [2] Offered through RBC Wealth Management Financial Services Inc.