# Albert Schoeley, CPA, CA, M.Acc.

Financial Planning Specialist
RBC Wealth Management Services

## The People Behind the Planning

Albert attended the University of Waterloo where he completed a Bachelor of Science degree in Science and Business and a Masters of Accounting degree. He is a Chartered Accountant and spent the last 10 years with a large public accounting firm where he rose to the position of Senior Tax Manager. Prior to joining RBC, Albert was focused on providing professional services to an array of clients, from individuals and their owner-managed businesses to publicly owned entities.

Albert is a member of the Canadian Institute of Chartered Accountants, Chartered Professional Accountants of Ontario and has completed as well as tutored the Canadian Institute of Chartered Accountants' In-Depth Tax Courses.

Albert believes that planning is critical to helping people meet their financial objectives. As a Financial Planning Specialist at RBC Wealth Management Services, Albert's role is to work with and support your advisor in preparing and presenting comprehensive Compass Financial Plans for clientsWorking closely with your advisor, Rick employs a comprehensive process to assess your wealth management needs and then recommends creative, tax-exempt insurance strategies to help address them. For more complicated situations, he works with your other professional advisors in the development of appropriate solutions.

## Specialized Financial Planning

At RBC, we recognize that with greater financial resources, comes greater financial complexity. To help you properly coordinate your financial matters and optimize the unique opportunities available to you, we are pleased to offer you our highest level of financial planning. Personally prepared by Albert Schoeley, a Financial Planning Specialist, your comprehensive Financial Plan will provide recommendations specific to your situation. Your plan will consider strategies to maximize your cash flow, reduce taxes, ensure your retirement lifestyle, protect your financial security, transfer wealth to next generation taxefficiently and make the most of your philanthropic legacy. In appreciation of your business, your advisor is pleased to offer this service to you on a complimentary basis.

**To schedule a complimentary meeting with Rick Squires, please contact your advisor.**