RBC Wealth Management
Dominion Securities

Edwards Private Wealth

6 tools that make it easier than ever to manage your wealth at home

Our team is hard at work at home, figuring out how we can best help you during this stressful time. We've compiled the best ways we are improving our business to enable you to manage your wealth from the sweet comfort of your couch, or wherever you may be.

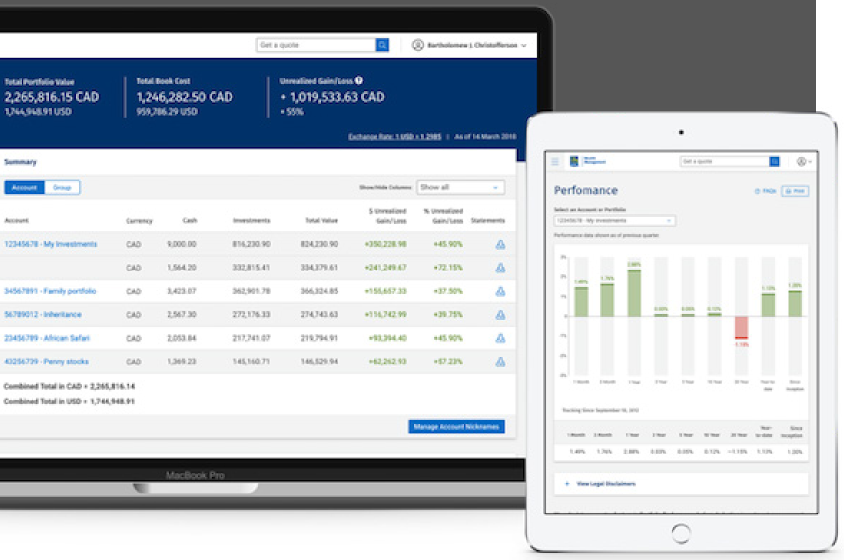
01 Virtual meetings

Virtual meetings are as close as we get to our normal face to face meetings – we miss seeing you! Our formal reviews are still continuing as usual; we have the technology. Virtual meetings don't have to be a formal review – we'd love to chat with you for a quick 20-minute catch up about what's going on in your life and any concerns you have.

During virtual meetings, we can share our screen with you and make live updates to your financial plan and retirement projection, just like we do in the office, so you can see what we're working on and how the current situation is affecting your goals.

New: Discovery meetings! Don't wait around until we're back to 'normal', as no one knows when that will be – consider reaching out for a virtual "coffee chat" and we can meet to discuss your situation.

02 WM Online is now launched



We are setting up digital access for more clients every day. With online access, you don't have to wait for business hours to call us for an update, market info, insights & research – the latest from our analysts is all on there, available 24/7.

Additionally, you can access the following services online at any time:

- Your latest monthly statements, available on demand.
- The current market value of your portfolio, updated in real-time
- Send us a secure message within the Messaging Center, which allows you to process requests more quickly and replaces the need for administrative paperwork.
- New capabilities are being added by our Technology team all the time!

Shortly you will be able to visit the Resources page on our website for instructions, but for now you can call us, and we'll set you up over the phone right away.

03 No more paper!

RBC is running an exciting new campaign in partnership with Tree Canada until August 30, called "e for a tree." For every client that switches to e-statements, signs up for DS Online or sets up online banking services, we will plant a tree in your honour.

You can switch your delivery preference from paper to digital for individual accounts with no paperwork. Plus, your tax slips are available instantly online when they are ready – nope, you don't have to wait for the tax package! (We can also set a tax package preference so that your accountant will also receive a copy when your tax slips become available, making the process much faster, and saving even more paper.)

And finally – the thing we are most excited to share with you – eSign! You will now have the capability to complete new account packages on any electronic device – no paper required. Gone are the days of pages upon of signatures - with an electronic stamp you can click, confirm and submit back to us, no matter where you are.

04 Real-time funds transfers

We know that not many of you have cheques anymore, or the time to wait for a cheque. If you already bank with RBC, you can facilitate a real-time funds transfer through your mobile app with just a few clicks.

Click for more information

For clients that don't currently bank with RBC, you can still transfer funds as a bill payment. Here are more details on how to complete this action.

Click for instructions

We're working to add more educational content for you all the time, including on important topics like the executor kit, estate planning checklist, our Financial Literacy Program and more. All of these will be uploaded to our new and improved website, www.edwardsprivatewealth.com.

Our new website will be an active "hub" that will allow you to see what we've been up to in your community, what people are saying about us, further information about the services we offer and more.

In addition to resources on popular topics, we will also offer an FAQ section, walk-through instructions for signing up for DS Online, as well as instructions for facilitating real-time funds transfers and resources that aim further simplify your financial life, such as market analysis and commentary, informative blog posts and more.

We aim to share as much of our knowledge as possible with you to make our in-person meetings as efficient and effective as possible, as we know you are busy and time is precious! Stay tuned for more information on our upcoming website improvements.

And speaking of sharing knowledge: we'd love for you to be a part of our virtual professional network on LinkedIn. We share insights, videos and articles here.

05 More resources for you online

Connect with us on LinkedIn

06 Connecting with specialists is easier than ever

Click to see our specialists

With virtual meetings, you are now able to meet with specialists sooner and meeting times are more flexible, for your convenience. Ordinarily, our specialists are often travelling for professional commitments, but now have more time to dedicate to talking with you about what matters most.

Our specialists' areas of expertise include: insurance, estate & Wills, estate & trust services, financial planning and more. These are fantastic individuals, with whom we highly encourage you to meet. Even if you have an existing plan in place, a review can help grant you further peace of mind.

There's no time like the present – let's have some great conversations. Get in touch with us to connect with a specialist, and find out more about our team here.

Finally, you don't have to limit your contact with us to once or twice a year, solely for reviews – we want to be a trusted source for you to go to with any needs you may have. RBC has a vast network of resources for you to access, so please don't hesitate to give us a shout with any questions you may have.

Feel free to chat with us about what's going on in your life, any pain points, if you need assistance with the Canada Emergency Response Benefit, if you have been affected by COVID-19. We work with so many superb banking partners that really know this stuff inside out and we'd love to connect you with them.

And lastly, we are always happy to talk with anyone that you think could use our services – we are Edwards Private Wealth of RBC Dominion Securities, and we operate under the umbrella of RBC. Use us as a resource, and don't hesitate to reach out! We are always happy to help anyone you know with anything that's on their mind.

We are working on some exciting changes to benefit our business and the work-from-home situation has really pushed these improvements to the forefront for us – that means fantastic updates for us, but even better updates for you!

Stay safe, keep in touch and we'll see you soon.