RBC Dominion Securities Inc.

The Charles Lasnier Group Private Wealth Management of RBC Dominion Securities Inc.

Why invest with Charles Lasnier?

Wealth Management
Dominion Securities

To invest successfully over a lifetime does not require a stratospheric IQ, unusual business insights or inside information. What's needed is a sound intellectual framework for making decisions and the ability to keep emotions from corroding that framework.

Warren Buffett

For a conservative approach and a responsible management of your investments

For many investors, financial markets represent countless risks. Charles Lasnier's objective is to reduce his clients' level of uncertainty. Of course, there are no magic solutions, but certain facts remain:

First, nothing replaces intrinsic quality when choosing an investment.

Second, you pay fees to obtain an analysis of your portfolio and the discipline with which it is managed, and not to be swamped with information available on the internet which does not nec-essarily apply to your situation.

Third, following the latest fads or the guru of the day is the best way to be swindled. Your portfolio must be based on conserva-tive investment principles that can withstand the passage of time. Nothing replaces prudent diversification for a stock or fixed income portfolio.

Fourth, wealth management must involve your investments, financial planning, estate planning and a good understanding of your tax situation.

With this in mind, Charles Lasnier is setting up investment plans based on the following:

Careful attention to your needs and assessment of your objectives. This is probably the most important part of your plan and unfortunately, often the most overlooked. A good understanding of your needs is essential to the creation of a financial plan and investment portfolio.

A plan that reflects your needs. Only through a serious review of your specific needs can this understanding be achieved. In return, we will not offer you ready-made solutions. Charles Lasnier believes your plan should be personalised according to all aspects of your financial situation.

A business relationship based on personalised service and team expertise. It is easy to sell a financial plan, but providing a personalised service is another matter. Charles Lasnier works with a small number of households and gives them access to his team of professionals which includes experts in financial plan-ning, will planning, financial security and banking solutions.

Life is too short

Travelling, running their business, spoiling their grandchildren, golfing. Charles F. Lasnier's clients live their lives according to their priorities and values. Money is a tool for them, the source of their freedom, a family responsibility.

Because life is short, the relationship they have with Charles Lasnier is based on conservative and transparent wealth management in a way that minimises risks.

Why Charles Lasnier?

Good question. Broken promises will wear out an investor's trust and make anyone weary of flashy slogans.

Charles Lasnier's commitment is simple but extremely rare: he provides his clients with a conservative, independent opinion. Not necessarily the opinion in fashion or the one you want to hear. Charles Lasnier offers an opinion based on a true analysis of your situation and unbiased research.

Charles attended his first shareholders meeting at the age of 13. At that time, he owned seven shares of the Bank of Montreal and, to his amazement, his parents allowed him to miss school to attend the meeting. The following year, he attended a stock exchange camp at HEC.

He created his first company in 1985 and played an active role in politics in 1989 during the US-Canada Free-trade debate.

In 1990, he discovered the joys of volunteer work when he accepted the responsibility of minor hockey coach. To this day, he still does volunteer work in various organisations.
He received a B.A. in political science in 1992 and an MBA in 2000.

His parents encouraged him early on to be curious, sceptical and to think independently. He considers that these qualities are essential to being an advisor.

He joined RBC Financial Group in 1992. Over the years, he has developed a solid understanding of risk management principles and a prudent financial philosophy.

1992 was a great year for him as it was the year he met his wife, Danielle and mother of his children, Frederic and Sophie.

A long-time member of the Royal Montreal Golf Club, Charles likes to golf, is a car buff, and insists on walking the length of the beach of Biddeford Pool (Me) at least once a year.

Charles' portfolio management approach is based on proven financial principles that have withstood the test of time: diversification and a well-balanced distribution between fixed income securities and equities. Not every investment advisor can find just the right balance that suits me. It is even more difficult to keep this balance in place over the long run.

Nevertheless, that is the key to sound and optimistic management of my assets. Charles manages to do so by giving top priority to this process, which means for me having peace of mind and medium- and especially long-term satisfaction.

André L'Espérance
Magog

Charles and his team provide impeccable customer service. They anticipate my needs, there is always someone available to take my calls, and when they need to find an answer to one of my questions, they get back to me very quickly. Therefore, today I can travel with peace of mind, knowing my portfolio fully meets my expectations.

Germaine Forest
Retiree

Charles personally takes the time to fully understand my needs with regards to investment and financial risk management. I consider that the financial plan he has set up for me and my family totally meets my expectations.

Furthermore, he and his team are able to provide a first class service.

Michel Beaudoin
President, Groupe Futech

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Wealth Management
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