Claudia Morrison, PFP, CIM

Regional Trust Advisor

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As a Regional Trust Advisor, Claudia Morrison serves clients throughout the Ontario and Atlantic regions and is located in the Ottawa office. Claudia provides strong organizational and relationship-building skills to deliver comprehensive estate and trust solutions for executors, trustees and beneficiaries. Clients appreciate her ability to explain complex concepts of estate and trust administration in terms that they can relate to and with sensitivity.

A graduate of Carleton University with a Bachelor of Arts Honours degree, Claudia has continued to deepen her knowledge and expertise with key industry designations such as the Personal Financial Planner (PFP) and Chartered Investment Manager (CIM) designations. She has also completed the Canadian Securities Course.

Claudia has held various roles in banking, investment counselling and estate and trust administration that provide her with a unique depth of understanding around integrated solutions to meet client needs. With more than 20 years of financial services experience, Claudia brings to each client the necessary skill set to provide both the technical expertise as well as the genuine understanding of the emotional complexities that underlie these issues. Claudia understands that no two clients are the same and so together with her RBC Estate & Trust Services partners, she can find the solution that's right for you.

Wealth Management
Estate & Trust Services

RBC Estate & Trust Services: A century of trust

RBC Estate & Trust Services has been serving Canadians since 1899. We provide individuals, families and businesses with valuable estate, trust and incapacity solutions tailored to their specific needs. Our clients are often dealing with unique and complex issues, and want a personal relationship with a skilled advisor who can deliver tailored, thoughtful solutions.

Our Estate & Trust Services team is comprised of specialized and experienced professionals including legal counsel, accountants and other specialists with years of estate and trust experience. We are an exceptionally strong professional trust services firm, supported by the strength, stability and resources of RBC Financial Group, Canada's largest bank.

What we offer our clients:

- Guidance through life events and times of transition with expertise, empathy and efficiency
- Compassion and understanding of the family's experience
- Peace of mind knowing that there is stability and continuity to the long-term relationship with beneficiaries
- Assistance in the preservation, management and transfer of wealth between generations by providing solutions to implement clients' estate and trust plans
- Financial security to Canadians who require assistance in the management of their affairs as they grow older

Wealth Management
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