



## Anna-Marie Lyons, MBA, CFP, FDS<sup>t</sup>

Financial Planning Specialist  
RBC Wealth Management Services

### The People Behind the Planning

Anna-Marie Lyons graduated with a Masters in Business Administration from the Ivey School of Business, University of Western Ontario. She has completed all three levels of the Canadian Institute of Chartered Accountants (CICA) In-Depth Tax Course and is a Certified Financial Planner.

As an advisor to high net worth clients since 1991, Anna-Marie is a committed advocate for financial literacy and believes that a plan is imperative to meeting long term financial goals and ensuring effective estate transitions. Her role is to work with and support your advisor in preparing and presenting a comprehensive Compass Financial Plan.

#### 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 Anna-Marie, 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 your next generation tax-efficiently 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 meeting with Anna-Marie Lyons, please contact your advisor.**



**Wealth  
Management**