RBC Dominion Securities Inc.

Your professional estate planning team

De Jong Wealth Management of RBC Dominion Securities

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Wealth Management
Dominion Securities

Earning the right to work with clients

Peter de Jong
Senior Investment Advisor

At RBC Dominion Securities, Peter de Jong strongly believes that financial success comes from developing the right vision with the right partner. Listening to our clients, we strive to ensure we have an acute awareness of what is important to them and how this affects their financial success.

Peter de Jong is experienced in managing wealth for affluent clients. His clients have access to a comprehensive range of investment solutions to help build and protect their wealth. His team's highly disciplined process ensures that each client's wealth is managed according to the highest standards.

A native Albertan, Peter was born and raised in Calgary. Growing up in a household where hard work and commitment were encouraged, these types of values began to define him and led to his advancing successes in many areas; including representing Canada as an amateur wrestler in two Junior World Championships, then taking on the hard labour of working up north in the oil and gas industry to help fund his education. The hard work continued when Peter graduated from post-secondary in 2004 and began his career with RBC Dominion Securities in 2005. Starting as an Associate under the tutelage of an experienced Vice President & Investment Advisor, Peter earned the right to succeed him in the management of his clients' assets in 2011. Since that time, he has made the ranking of an Executive Council Investment Advisor every year since 2012.

Peter's strongest support comes from his family. Married in 2006 to his wife Tina, Peter credits much of his success to the foundation of support he receives from his family at home. Together, Peter and Tina are the proud parents of their two children Ryker and Scarlet as well as furry rescue dog Abby and cats Maggie and Spirit.

Peter feels that it is important to give back to Calgary – a community that has provided him with so many opportunities. Peter joined Kidsport Calgary as a Director at the beginning of December 2018. He and Tina are also avid supporters of the Cochrane Humane Society.

North America's Premier Wealth Management Group

Investment management is just one key part of a well-rounded wealth plan. Through us and RBC Dominion Securities Wealth Management Services team, a wide range of wealth management services are available including, financial planning, will and estate consultations, insurance assessments, strategic tax-minimization reviews and high-net worth planning.

To ensure proper coordination of all strategies, we work in consultation with your other professional advisors such as accountants, lawyers and private bankers.

Coordinating your affairs to simplify your financial life

What does a comprehensive wealth management strategy include?

Investing

- Custom-design your portfolio based on your needs for income, growth and security
- Diversify to manage risk and achieve return objectives
- Review and rebalance on an ongoing basis

Financial planning

- Clarify your financial goals
- Create a net-worth statement
- Recommend planning strategies

Tax planning

In consultation with your tax advisors, we can help you identify tax-minimizing strategies that can:

- Protect your wealth
- Enhance your after-tax retirement income
- Minimize estate taxes

Estate and legacy planning

- Identify opportunities to protect your estate for your family
- Help simplify estate settlement
- Help you create an enduring family legacy

Retirement planning

- Maximize retirement savings and income
- Coordinate transition into retirement
- Assist with business succession

Insurance planning

- Protect your financial security
- Enhance your after-tax wealth
- Minimize impact of estate taxes

Credit and lending

We can introduce you to an RBC banker to assist with:

- Cash flow management
- Personal credit and lending
- Business financing and leasing

Education

- Assist with tax-advantaged strategies to fund a family member's education

Building your wealth … and your confidence

At RBC Dominion Securities, we provide the expert advice, personalized approach and sophisticated solutions you need to build and protect wealth – all backed by the strength and stability of RBC.

Vital stats

RBC Dominion Securities[1]

- Canada's leading full-service wealth management firm[2] with $320 billion in assets under administration
- Established in 1901
- Over 1,800 Investment Advisors in 160 branches in communities across Canada
- 420,000 clients worldwide
- One of Canada's largest discretionary managers with $100 billion in assets under management
- Member of the Investment Industry Regulatory Organization of Canada (IIROC), the self-regulatory organization overseeing Canadian investment firms
- Clients' accounts protected by the Canadian Investor Protection Fund (CIPF) within specified limits (a brochure describing the nature of limits of coverage is available upon request)
- #1 overall bank-owned investment firm as ranked by advisors (2018 *Investment Executive* Brokerage Report Card)
- A member company of RBC Wealth Management

RBC Wealth Management[3]

- Over $981 billion in assets under administration and more than $682 billion in assets under management
- Ranked "Best Private Banking Services Overall" for 11 consecutive years (2008-2018 *Euromoney* Private Banking and Wealth Management Survey)
- Recognized as the world's fifth-largest wealth manager in Scorpio Partnership's Global Private Banking KPI Benchmark 2018 survey, as part of RBC Royal Bank

RBC Royal Bank[3]

- Canada's largest bank by assets and market capitalization, with broad leadership in financial services
- A top 15 bank globally based on market capitalization[4], with operations in 35 countries
- Over 84,000 full- and part-time employees serving more than 16 million clients worldwide
- Strong credit ratings: A2 (Moody's), A (S&P), AA (Fitch), AA-low (DBRS)[4]

[1]Financial information as of Jan. 31, 2019. Source: RBC Dominion Securities. [2]Strategic Insight's Retail Brokerage and Distribution Report—Canada (Fall 2018). [3]Financial information as of Jan. 31, 2019. Source: RBC. [4]As of Feb. 21, 2019. [5]Scorpio Partnership's Global Private Banking KPI Benchmark 2018.

Top global wealth managers[5]

Rank	Company	Assets under management (US$ B)
1	UBS	2403.8
2	Morgan Stanley	2223.1
3	Bank of America	2206
4	Wells Fargo	1899.3
5	**Royal Bank of Canada**	**907.9**