QUESTIONS FOR EACH STAGE OF THE FUTURE MAXIMIZER

Through the Future Maximizer process, our clients gain confidence in their financial plan and the strategies we use to help them reach their life and financial goals.

Here are some questions we can help you answer.

The Clear Vision Advantage

- What was life like growing up?
- How did you get to where you are today?
- How do you currently make investment decisions?
- What do you expect from your financial advisor?
- If you could give financial advice to your 20-year old self, what would it be?

The Design Gameplan

- What rate of return do you need to achieve your goals?
- What guiding principles do you follow with your money?
- How would you like your estate to benefit your family or the charitable causes close to your heart?
- What are your financial goals? What time horizon do you have for them?
- Will you be contributing additional funds to your plan?

The Choice Navigator

- How much day-to-day involvement do you want when managing your investment portfolio?
- Do you value diversification by portfolio manager and styles?
- What are the tax implications of each choice?
- Is the greater flexibility of owning individual securities important?
- Would you like a transparent, tiered and tax-effective fee structure?

The Review Process

- How often would you like to meet with me?
- Are there specific issues you would like to learn about?
- What family wealth management issues are you dealing with?

LUC PERRON, CFA | *Portfolio Manager & Investment Advisor*

TEL: (613) 749-9219 • TOLL-FREE: 1 800-267-7680 • E-MAIL: luc.perron@rbc.com • www.lucperron.com

RBC Dominion Securities | 1420 Blair Place, Suite 801, Ottawa, ON K1J 9L8 • FAX: (613) 749-4005

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