Financial planning

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

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

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

What does a comprehensive wealth management strategy include?

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