RBC Dominion Securities Inc.

Eddy Mejlholm, CFP, CIM, FCSI
Portfolio Manager & Wealth Advisor

Personalized, professional financial guidance
that maximizes your potential

Wealth Management
Dominion Securities

Eddy Mejlholm is a Portfolio Manager & Wealth Advisor who helps individuals, families and their associated organizations achieve their personal, organizational and financial goals. Using a disciplined planning process, smart growth strategies and individualized risk-analysis, Eddy builds evidence-based investment portfolios personalized to you.

Financial professionals often use industry jargon that can mystify money matters. Eddy uses plain language so you can make the right choices for you and experience the calm that implementing a sound plan can bring.

Recognized as one of the leading advisors in the Fraser Valley, Eddy provides an all-encompassing range of wealth management services designed to your unique specifications.

A disciplined process is the key

Eddy follows a disciplined five-step process to keep you on-track to achieving your goals. He keeps everyone focused on what's important – helping you live life the way you want to live it.

1. Introduction
Eddy will introduce you to the wealth management services he provides, not just during the first meeting, but on an ongoing basis as your needs evolve and new services become available.

2. Discovery
Together, you and Eddy will gain a deeper understanding of your individual needs, goals and circumstances to help you clarify your financial objectives. This includes gathering together all your important financial information.

3. Strategy
Next, Eddy will analyze your financial and personal information to match your objectives with smart, time-tested strategies.

4. Solutions
Eddy will develop thoughtful and creative solutions tailored to your objectives, drawing from a wide selection of world-class products and services.

5. Service
Eddy will regularly review your situation to ensure your financial objectives are being met in light of your changing needs.

Who Eddy can help

Eddy's services are best suited for investors who:

- Have little time to invest and want someone else to manage the details
- Want peace of mind knowing their finances are well managed and being looked after by a team of competent professionals
- Are looking for a consultative approach rather than a transactional approach
- Are looking for a long-term relationship with their advisor
- Are undergoing or preparing for life changes such as retirement, business transitions, pension buyouts, family changes, estate matters or other challenges
- Are growing their wealth rapidly via professional success, stock options, signing bonuses or other windfalls

A refreshing and straightforward approach to wealth management

Eddy is pleased to offer you a wide range of investment and wealth management services, many of which are complimentary to you as a valued client.

Investable assets	Services provided
Any amount	• Financial plan to address your particular needs (may include retirement projections, estate plan, tax planning, income planning, education funding, etc.) • Determine risk level and build personalized portfolio • Provide research, commentary and information on investment holdings, markets and economy, including our Global Insight reports • Ongoing personal guidance: annual in-person review with email and phone support on demand • Quarterly portfolio monitoring and rebalancing • Safekeeping and custodial services, including multi-currency accounts • Automated transactions if required, including electronic funds transfers • Annual tax reporting package • DS Online providing 24/7 account access • Consolidated account viewing of all RBC accounts • Access to our in-house Estate Planning Specialist to review and recommend risk management solutions and insurance-based wealth enhancement options
$500,000 – $1,000,000	• Development of an Investment Policy Statement • Access to an RBC Financial Planning Specialist to prepare a complete financial plan covering all major areas of personal finance • Semi-annual in-person review with email and phone on demand • Charitable gift planning • Multigenerational planning
$1,000,000 – $5,000,000	• Access to an RBC Will & Estate Consultant who can do a review of all of your legal estate matters and provide personalized recommendations • Access to an RBC Financial Planning Consultant who can prepare a complete financial plan covering all major areas of personal finance, including analysis of trusts, corporate finances and advanced tax planning • Quarterly in-person review with email and phone on demand • Business succession planning and corporate reorganization advice
$5,000,000 +	• Monthly in-person review with email and phone on demand • Access to an RBC high-net-worth Financial Planning Consultant** • Access to RBC Capital Markets specialists • Access to Private Banking services

**High-net-worth Financial Planning Consultant available for assets over $20,000,000.

Putting you first with a team approach

As Eddy's client, you will receive timely service and professional advice through his team approach. Each team member focuses on different areas of client service, so you get the assistance you need when you need it.

Eddy Mejlholm, CFP, CIM, FCSI
Portfolio Manager & Wealth Advisor

Eddy offers a wealth of experience as your advisor.

He has worked in the financial services industry since 2005, and before that spent several years in the telecommunications industry. In addition to many financial industry qualifications and training, including the Certified Financial Planner (CFP), Chartered Investment Manager (CIM) and Fellow of the Canadian Securities Institute (FCSI) designations, Eddy has a Bachelor of General Studies degree and an Advanced Certificate in Management Studies from Thompson Rivers University.

Eddy grew up in nearby Surrey and has lived in Chilliwack since 2008. He has been married since 2003 and has three sons. The family is very involved in their church, the local YMCA and other charities. They also love the outdoors and can often be found biking, hiking, running, canoeing and camping around B.C.

Eddy is passionate about giving his clients comprehensive guidance and realistic sustainable recommendations based on their needs. He cares deeply about his clients' well-being and seeks to develop long-lasting relationships.

Kimberly Pooni
Associate

Kimberly works with Eddy to ensure you receive timely and efficient service. She joined RBC Dominion Securities in 2017 after a career in the health care industry. In 2013, she received both a Bachelor of Arts degree and an Associate of Science degree from the University of the Fraser Valley, after which she took time off to travel. Kimberly has 12+ years of experience in customer service, including roles in management and administration.

Kimberly enjoys spending time with her family and friends, travelling and cooking. She is also dedicated to ongoing learning and has completed several industry training courses to further her knowledge and abilities.

Linda Symons
Associate

Linda joined RBC Dominion Securities in 2015 after a one-year sabbatical from the investment industry, which was spent building her new home in Chilliwack. She has been a licensed Associate since 1996. With 30 years in the investment business, Linda has worked as a Branch Administrator and is currently an Associate focused on business development. She can help you with all your administrative needs here in the Chilliwack Branch.

Linda and her husband moved to Chiliwack in 2014 to be closer to her daughter and grandchildren.

Together, Kimberly and Linda assist with daily administration so Eddy can focus on portfolio management with confidence that you are well looked-after.

Extended wealth management services team

Helping you manage your investments is just one way Eddy can assist you with your overall financial concerns. In addition to investing and money management, he offers assistance with financial planning, insurance strategies, and Wills and estates through an extended team at RBC Wealth Management.

Financial planning

Depending on your needs, Eddy can provide a financial plan designed to help you build your financial future or, if you have more complex needs, an in-depth financial plan that leaves no stone unturned.

Will and estate consultation

A professional Will & Estate Consultant works closely with Eddy to provide you with information on structuring your estate in an efficient and tax-effective manner. Following your Will and estate consultation, you will receive a report outlining various estate-planning opportunities for you to explore in further detail with your own lawyer or accountant.

Insurance strategies

A highly qualified insurance specialist works with Eddy to help you create and preserve your wealth. They follow a comprehensive process to assess your needs and, if appropriate, recommends tax-exempt insurance products that will help you achieve your wealth management objectives.

Professional network

Eddy also offers access to a network of professionals such as lawyers and accountants to help ensure that the various issues related to the management of your wealth are properly addressed. If you have existing relationships with professionals in these areas, Eddy would be pleased to work together with them.

Dana George, LL.B
Will & Estate Consultant
RBC Wealth Management Services

Prior to joining RBC Wealth Management, Dana practised law in Calgary, Lake Country (Kelowna area) and Vancouver. She started her own practice in Lake Country which consisted of estate planning, real estate development and conveyances and small business corporate matters. In 2010, Dana joined a law firm in Vancouver specializing in estate and trust planning, estate administration, where she also advised business owners in all corporate, succession and real estate matters.

Dana's role is to work with you and your advisor to review and restructure your Will, estate and trust matters to ensure that your plan is organized in an effective and tax-efficient manner.

Doug Waymark, CFP, FMA
Financial Planning Consultant
RBC Wealth Management Services

Doug brings more that 30 years of experience in financial services to his role as a financial planner – experience that has honed his ability to help people successfully navigate each stage of their financial lives. Doug is a fellow of the Institute of Canadian Bankers, a Certified Financial Planner and a Financial Management Advisor. In addition, he holds the Specialist Trust Institute designation.

Doug believes that a financial plan is extremely valuable in helping you achieve your goals for overall long-term financial well-being. It can provide you with a clear picture of where you are now and create a strategy for what you need to do, to have peace of mind for the future.

Eugene Dautzenberg, CPA, CA
Financial Planning Specialist
RBC Wealth Management Services

Prior to joining RBC, Eugene was a tax manager at one of the world's leading accounting firms where he spent many years providing tax compliance and tax planning services to high-net-worth individuals, private companies and First Nations. He holds a Bachelor of Business Administration degree and has completed and tutored the Canadian Institute of Chartered Accountants' In-Depth Tax Course. He has also completed the Advanced Tax Issues for Owner-Managed Business Course.

Eugene believes that planning is critical to helping people meet their financial goals. Eugene's role is to work with and support your advisor in preparing and presenting comprehensive Compass Financial Plans.

Matthew J. Leggett, CFP, CLU, CHS
Estate Planning Specialist
RBC Wealth Management Financial Services

Matthew works to help you create, preserve and transfer wealth by incorporating insurance solutions into an all-encompassing financial plan. His relationships with top-ranked Canadian insurance companies are a tremendous asset when working to secure and protect your wealth.

Specializing in estate planning, Matthew provides personalized solutions to address concerns related to excess taxation, estate preservation and business succession commonly faced by our firm's clientele.

Take the next step – contact us today for a complimentary consultation.

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