



**Wealth Management
Dominion Securities**

The Family Enterprise

It is how we work together that sets us apart

As family wealth managers, we see our role as bringing the professionalism of public companies to the private work of growing and protecting a family's assets for generations.

Who We Are

Managing family wealth successfully is a complex and unique undertaking for families. Unlike public companies, a family's success is not defined by earnings, but rather by any number of tangible and intangible benchmarks. Success may be seen as asset growth and protection, and may also be measured by peaceful transition of capital across a generation, or by a cohesive group of family members collaboratively managing the founders' philanthropic program.

Whatever the measures, the work of managing family wealth cannot be underestimated; nor can putting in place a team that has the background, experience and understanding to do so.

We come to you with an integrated platform, which is really about managing family wealth—not just investment management alone. Financial families seek our services to address the challenges they encounter in a professional manner, similar to what you could expect from a family office.

Our Beliefs

We believe in a comprehensive approach, and that wealth is financial, relational and personal well-being. We

incorporate these beliefs into all of our transactions with clients. Every family client is unique with individual needs, hopes and goals. In order to help you meet these goals, we start by gaining a clear understanding of what your objectives are before defining our particular service offering.

Our Services

For wealth management to be truly meaningful for our clients, we seek to help families with both the quantitative aspects of their wealth management as well as the qualitative aspects.

Quantitative

By "quantitative" we mean the more traditional investment services, which we excel in:

- ✓ Providing objective, integrated investment and financial advice
- ✓ Non-benchmarked investment performance
- ✓ Providing access to third party, best in class managers
- ✓ Assisting with and working with your advisors on complex legal strategies and structures, making sure they are effectively integrated into your financial dealings

Qualitative

However, for most of our client families, these "quantitative" aspects are not enough—they are looking for more. Many of our clients worry about the impact their wealth will have on their families, and frequently ask us questions like:\

- ✓ How much is enough?
- ✓ How do we ensure that the wealth we have created is meaningful for our children and does not kill motivation or nurture entitlement?
- ✓ How do we treat our children fairly?
- ✓ How do we prepare our children or successive generations for wealth?
- ✓ How to we ensure that others do not take advantage of our children?

These are the qualitative aspects—the human, intellectual and social capital of families. Leveraging on our knowledge and relationships we have built, we provide our clients with a comprehensive understanding of many of the considerations they should address, bringing best practices, polices and structures that position our clients at the leading edge of families of wealth. We will raise risk factors that could jeopardize our clients' hopes and vision, and suggest meaningful ways to manage

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risk, so that both investment goals (quantitative) and life goals (qualitative) aspects of their family legacy are realized.

Why Choose Our Team?

We could be the right fit for your wealth management needs if you:

1. Want objectivity, access to best-in-class third-party managers, tactical portfolio management, lower fees & better results
2. Want to invest the same energy and creativity into the future of your wealth as you invested in the creation of your wealth
3. Care as much about the qualitative aspects of your planning (your loved ones, your values, your legacy) as much as the quantitative aspects of your planning (tax, legal, insurance, investments)
4. Would like what you have created or inherited to sustain beyond your generation

Common family challenges that we can assist with, either directly on our team or through our strategic alliances, include:

- ✓ Developing the human, intellectual & social capital of family members
- ✓ Deciding how much inheritance is enough for future heirs
- ✓ Providing leadership training experiences for future wealth owners
- ✓ Providing financial education for all members of the family
- ✓ Helping families with infrastructure to enable stewardship for future generations

- ✓ Helping families develop their own family constitution, governance structure, & board
- ✓ Helping families gain the skills & confidence required to run their own family meetings

We are able to act as conduits for our clients' most complex and sensitive needs—from the strategy and facilitation of complex local or global banking requirements, estate and trust services, children's financial fluency and education, to strategic business planning and valuation services.

We will work with you to put in place a process to realize your goals and design solutions to meet your unique needs—all supported by structures that will sustain your family's legacy. Throughout this process, we will prioritize education, ensuring that each family member's skills and talents are refined in order to best handle the wealth, manage advisors, and ensure healthy family relationships.

Working Together for You

There are many ways that we, in concert with our strategic alliances, can work with you and your family to support your long-term family wealth vision.

Investment Management

- ✓ Provide personalized attention and customized solutions
- ✓ Provide superior investment performance
- ✓ Provide comprehensive performance reporting

- ✓ Participate in manager selection & manage asset allocations across multi-managers

Charitable Giving

- ✓ Support family philanthropy & provide an educational platform around this
- ✓ Develop personal gifting programs
- ✓ Administer family foundations

Trust and Estate

- ✓ Provide estate planning recommendations
- ✓ Develop personal wealth plans
- ✓ Support trustees in fiduciary duties

Strategic Wealth Management

- ✓ Identify financial resources & objectives
- ✓ Develop intergeneration wealth transfer planning
- ✓ Identify appropriate asset allocation & investment strategy
- ✓ Coordinate with your advisors for a cohesive approach

Family Unity

- ✓ Support the long-term vision of your family
- ✓ Provide active guidance, promote and support governance for the family and the committees, etc.

For more information, please contact our team today.

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