



**NATHALIE FISETTE-CAZA**  
**MBA, D.Fisc.,TEP**  
**Vice President**  
**Business Owner Specialist**  
**High Net Worth Planning Services**  
**Wealth Management Services**

## Introducing Nathalie Fiset-Caza

### Vice President

### Business Owner Specialist

As a Business Owner Specialist, High Net Worth Planning Services, Nathalie together with your primary RBC advisor, helps you explore succession, tax, retirement and estate planning issues you face as a business owner.

Nathalie has a Bachelor's degree in Finance and a Graduate degree in Tax Law from the University of Sherbrooke. She has also completed a Master in Business Administration from Laval University and a degree in international commerce from l'École Supérieure de Commerce (ESC) in Poitiers, France. She is a Certified Financial Planner and has completed the Securities Dealers Course from the Canadian Securities Institute.

Nathalie has more than 15 years of experience in tax and estate planning consulting for business owners at life insurance and financial institutions. Nathalie has given several lectures at the Association de planification fiscale et financière (APFF) annual conferences and is an active writer of articles on topics related to tax and estate planning.

Nathalie is an active member of the executive committee of Society of Trust and Estate Practitioners (Quebec branch). She is also a member of the Association de planification fiscale et financière, the Institut Québécois de planification financière (IQPF) and the Canadian Tax Foundation.

#### COMPLIMENTARY BUSINESS OWNER PLANNING

As a valued client, you are entitled to complimentary business owner consultations with a highly qualified Business Owner Specialist.

As your Business Owner Specialist, Nathalie will work closely with your advisor to identify strategies and solutions that are customized to meet your personal and business planning objectives. Tax, business risk, succession, and retirement strategies, some that are particular to the business owner/manager, will be identified, which you would then discuss with your lawyer and accountant.

**To schedule your complimentary business ownership planning session with Nathalie Fiset-Caza, please contact your RBC advisor.**



**RBC Wealth Management**