Wealth Management
Dominion Securities

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The expertise of our team, the strength of RBC

Financial guidance is an investment in itself.
Has your return been worth what you paid?

At RBC Dominion Securities, we provide a truly comprehensive suite of wealth management services to each of our clients. We also understand that no client family situation is the same, and you require financial guidance tailored to your unique needs and objectives.

Ask yourself:

- Do I know exactly what I pay for investment guidance?
- Am I getting good value?
- Do I have access to estate and tax planning experts?

If you answered “no” even once, take a look at the diverse range of services we incorporate into our wealth management practices. You may find what you didn’t know you were missing.

Total wealth management

And total peace of mind

When it comes to looking after your wealth, check every box.

❍ **Tax planning –** It's not what you make, it's what you keep. In collaboration with your other professionals, we employ a range of strategies to prevent excessive taxing - from income splitting to reorganization of investments.

❍ **Estate planning –** Providing insight and understanding into your Will or Powers of Attorney, we help you determine the best path for taking care of your affairs. It's our pleasure to work with your current attorney or recommend one that may be suitable.

❍ **Discretionary investment management –** This service frees investors from the burden of making day-to-day investment decisions by passing this responsibility to a qualified portfolio manager. We have the tools to build portfolios attuned to the goals and risk tolerance of each client.

❍ **Insurance planning –** Let us help you protect your family from unforeseen financial duress due to disability or death. We decipher the often-confusing world of insurance and "shop the market" to ensure your premiums are competitive.

❍ **Business planning and financial analysis –** This service provides more insight on cost awareness, valuation and succession planning. Our financial statement analyses can give you a more in-depth understanding of your business and its bottom line.

❍ **Access to specialists –** Our extensive network at RBC Dominion Securities provides our high-net-worth clients with specialists in every area of wealth management. In-house Chartered Financial Accountants, lawyers, Financial Planning Specialists and other professionals provide additional insight and analysis.

❍ **Low costs for your overall financial plan –** As the largest wealth management provider in the country, we have the competitive ability to provide our clients with fair pricing for uncompromised service.

Contact us today for an objective second opinion on your investment portfolio.