S. Robinson & Associates of RBC Dominion Securities

Associate Portfolio Manager & Investment Advisor Steve Robinson and his team represent one of the top wealth management groups at RBC Dominion Securities. Located in Brampton since 1992, Steve and his fully licensed group have over 60 years of experience and manage over a quarter of a billion dollars for clients including foundations, charities, business owners, retired and recently retired successful Canadians. Steve ensures that their financial affairs are in good order – which means, in addition to having a solid portfolio, Steve will help design and coordinate your Will, estate, succession and insurance plans to maximize your wishes while minimizing current and future tax obligations.

WHO WE CAN HELP

Our services are designed for clients who have reached the stage where their financial affairs have become increasingly complex and they require professional assistance managing their investment assets. Our clients include:

- Busy executives and professionals looking to free their time to focus on personal and career goals
- Successful business owners and self-employed professionals who need help managing personal and business assets
- Pre-retirees who want to make the most of their retirement savings as they approach retirement
- Retirees requiring innovative strategies to maximize their after-tax retirement income, while protecting their financial security
- Well-established families seeking professional guidance transferring wealth to the next generation in a tax-efficient manner
- Philanthropists looking for creative ways to enhance their legacy to chosen charities
- Non-profit organizations requiring assistance managing investment assets according to specific guidelines

INVESTMENT SOLUTIONS DESIGNED FOR YOU

The starting point for achieving your investment goals is a personalized strategy. Several important factors will be considered in the creation of your strategy – such as your personal investment goals, how long you have to invest, and your attitudes toward risk. Based on this, we will recommend guidelines for making investment decisions – including security selection and asset mix criteria. Over time, your plan will evolve to keep pace with your changing needs and will be adjusted to reflect current market conditions.

HELPING YOU MAKE INFORMED DECISIONS

Research

To help provide you with well-informed advice, S. Robinson & Associates of RBC Dominion Securities has access to research from several leading firms.

- Industry-leading RBC Capital Markets covers close to 700 companies in all major industry sectors in North America
- Independent Veritas provides in-depth reports on major Canadian companies exclusively to RBC Dominion Securities
- Several leading U.S. investment firms like Standard & Poor's offer coverage of companies around the world

Portfolio strategy

Making sense of today's ever-changing financial markets isn't easy. But having the right perspective on where the markets are going – and how that affects your portfolio – is essential to succeed as an investor.

Helping Steve provide the perspective you need is the RBC Investment Strategy Committee. This leading strategy group is comprised of our senior economists, portfolio strategists and research analysts. After considering investment research and economic analysis, the Strategy Committee makes recommendations on portfolio structure for the coming 12 months, including:

- The optimum mix of stocks, bonds, and cash
- Suggested term for fixed-income investments
- A "focus list" of top-ranked Canadian stocks collectively expected to outperform the benchmark TSX

FOCUSING ON THE BIG PICTURE

Getting the right investment advice is a key part of managing your wealth. But it's just one part of a bigger picture. You may also require assistance with your finances or taxes, help planning your retirement, or guidance on how to structure your estate in a tax-efficient manner. Perhaps you have very specific concerns that need to be addressed – like maximizing your retirement income or deciding how to pass on the family business.

Because these various aspects of managing wealth are all interconnected, it is important to take a coordinated approach. Our team can help you address all your wealth management concerns, working in partnership with your tax and legal advisors. We also offer several wealth management services, including financial planning, estate consultation and wealth protection.

Find out how a customized wealth management plan can help you achieve financial security, contact Steve's team today.

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Steve Robinson

Vice-President & Director, Associate Portfolio Manager & Investment Advisor

As Steve's client, you have access to a broad range of resources from RBC Dominion Securities. Drawing on these resources and experts, Steve can help you fulfill all your financial needs and deliver:

- Investment advice custom tailored to your needs
- Financial planning advice based on tax-efficient strategies that can help you build your wealth and the value of your estate
- Insurance strategies that go beyond traditional life insurance and incorporate tax-efficient solutions to protect your family, their lifestyle and your estate
- Tax plans that are customized to meet your individual and professional needs so that you maximize your wealth and minimize your tax obligation over the long term

You can trust that, with the support of RBC Dominion Securities, Steve and his team will put your needs first, and will care for your financial security while helping you achieve your financial and personal goals.