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# Commitment to service



Wealth  
Management

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When you make the decision to work with me, it is a responsibility I take seriously. Developing a financial strategy that addresses your immediate needs and helps position you and your family to meet your long-term financial goals is just one aspect of my role as your financial advisor. I am also committed to understanding your communication preferences and providing you with the types of services you desire.

## Monitoring your progress

Once your plan is in place, you will receive ongoing communications to report on the progress of your plan and the performance of your investments. RBC Wealth Management's rigorous performance reporting process includes:

- **Online account access** — To experience our client website firsthand, visit [www.rbcwm-usa.com](http://www.rbcwm-usa.com) and click on "Take a Tour."
- **Detailed statements** — Available online or mailed to your home.
- **Quarterly performance reports** — Relative to your goals and objectives including index benchmarks.

## Keeping you informed

Offering you information for the purpose of educating and providing you with practical financial advice is equally important. Through RBC Wealth Management, I am able to offer you access to resources and tools that help inform and keep you current on changes and trends in the financial markets that may impact your financial strategy.

For additional information, please don't hesitate to call.

## Services offered

- Wealth management plan
- Portfolio reviews
- Asset allocation analysis
- Timely research
- Market commentary
- Quarterly newsletters
- Educational seminars
- Organizational binder for financial documents
- Coordination with tax professional and attorney

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Investment and insurance products offered through RBC Wealth Management are not insured by the FDIC or any other federal government agency, are not deposits or other obligations of, or guaranteed by, a bank or any bank affiliate, and are subject to investment risks, including possible loss of the principal amount invested.

RBC Wealth Management does not provide tax or legal advice. We will work with your independent tax/legal advisor to help create a plan tailored to your specific needs.

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