

The benefit of a primary advisor relationship



Wealth Management

Coordinating on your behalf

Successful wealth management requires the skill and coordination of a wide range of professionals. While these specialists have expertise in their individual fields, the services they provide may affect the work others are doing on your behalf. Even though you have a team of highly trained professionals, you may not want to be responsible for keeping the lines of communication open between them.

As your primary advisor, your financial advisor at RBC Wealth Management can take the lead role in helping you accomplish your financial goals. This includes partnering with your:

- CPA
- Attorney
- Trust officer
- Private banker
- Insurance specialist

Your financial advisor is able to manage your professional relationships for you and has the freedom to choose from a wide variety of products and services to deliver optimal wealth management solutions.

With access to RBC's global resources your financial advisor also has the flexibility to work in concert with trusted internal and external partners to expand financial opportunities for you, including holistic recommendations regarding growing assets, managing risk, creating a retirement income and creating your legacy.



Trust services are provided by third parties. Neither RBC Wealth Management nor its financial advisors are able to serve as trustee. RBC Wealth Management does not provide tax or legal advice. All decisions regarding the tax or legal implications of your investments should be made in connection with your independent tax or legal advisor.