Retirement plan solutions for colleges and universities

At RBC Wealth Management, we recognize the importance of selecting and designing the most appropriate retirement plan for you and your institution. Universities who provide a solid retirement plan are better positioned to recruit, retain and reward quality professional staff needed to keep the university competitive.

As a full-service brokerage firm with access to a wide variety of non-proprietary retirement products, RBC Wealth Management is positioned to implement a retirement plan solution that helps to meet the university's needs and objectives.

The process

Our experienced retirement consulting team assists in finding the right retirement solution for colleges and universities at all levels. These professionals know plan design options, service vendors and the latest products.

As a team, we work with you during each stage of the retirement plan process. We will:

- Assist you in examining your institution's retirement plan needs, goals and expectations.
- Research the retirement plan marketplace to find a retirement solution that is right
- Guide you through each step of the implementation process
- Provide an ongoing service process to help make sure your plan runs efficiently and effectively

Components of our service process include:

- Assistance with a written Investment Policy Statement (IPS)
- Assist with investment reviews
- Analyzing asset allocation with you
- Delivering ongoing customized education
- Consulting individual employees on request

Our financial advisors are a critical part of the service process providing employee investment education and service. They are your primary contact for taking advantage of the benefits provided by our wealth management process.

RBC Wealth Management overview

RBC Wealth Management, a division of RBC Capital Markets, LLC, Member NYSE/FINRA/SIPC, is one of the nation's largest full-service regional securities firms. RBC Wealth Management serves individual investors and small business owners throughout the United States, and capital markets and correspondent clients in select U.S. and European markets.

Retirement services consulting model

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, LLC, does not provide tax or legal advice. We will work with your independent tax/legal advisor(s) to help create a plan tailored to your specific needs.

 2097 (10/18)