Personalized Financial Planning at RBC

Your idea
of feeling supported
happens here

Ideas Happen Here™

RBC®

The power of RBC Financial Planning

Gain access to financial advice and a flexible plan that is dynamic and evolves with you.

Strength you can rely on

As a Financial Planning client, you'll benefit from the strength and stability of Canada's largest financial institution based on market capitalization.[1] Our firm is built on a heritage of integrity and unwavering client dedication. With us, you gain the confidence that your financial future is supported by a trusted Financial Planner who combines experience, insight, and a commitment to helping you achieve what matters most.

Do it together

Our personalized approach combines cutting-edge technology with human advice to support you at every stage of your financial journey. Together, we'll build a customized financial plan that is truly your own. Beyond delivering a financial plan, we connect you to the right advisor at the right time – whether that means guidance on banking, borrowing, or support for your business.

Access to Canada's largest fund company[2]

We collaborate with RBC Global Asset Management to offer extensive global capabilities and a diversified breadth of investment solutions. The team of investment experts is trusted by millions of investors around the world and aims to deliver exceptional investment outcomes and valued insights to clients.[2]

1 Based on assets under management as of June 30, 2025 (Securities and Investment Management Association).
2 As of June 30, 2025. Based on Canadian assets managed by RBC Global Asset Management Inc. (Securities and Investment Management Association).

Our client-first approach

A financial plan designed around you can provide peace of mind – we look beyond the numbers to create a personalized, flexible plan tailored to your needs and goals.

Your RBC Financial Planner will get to know you. We’ll answer your questions, provide insights on a personalized financial plan, and collaborate to help you achieve your goals.

Discover how professional advice can give you confidence in your plan and peace of mind about your financial future.

Our commitment and ongoing support means we’ll be on your path – whether that is in person or virtual.

Planning made personal

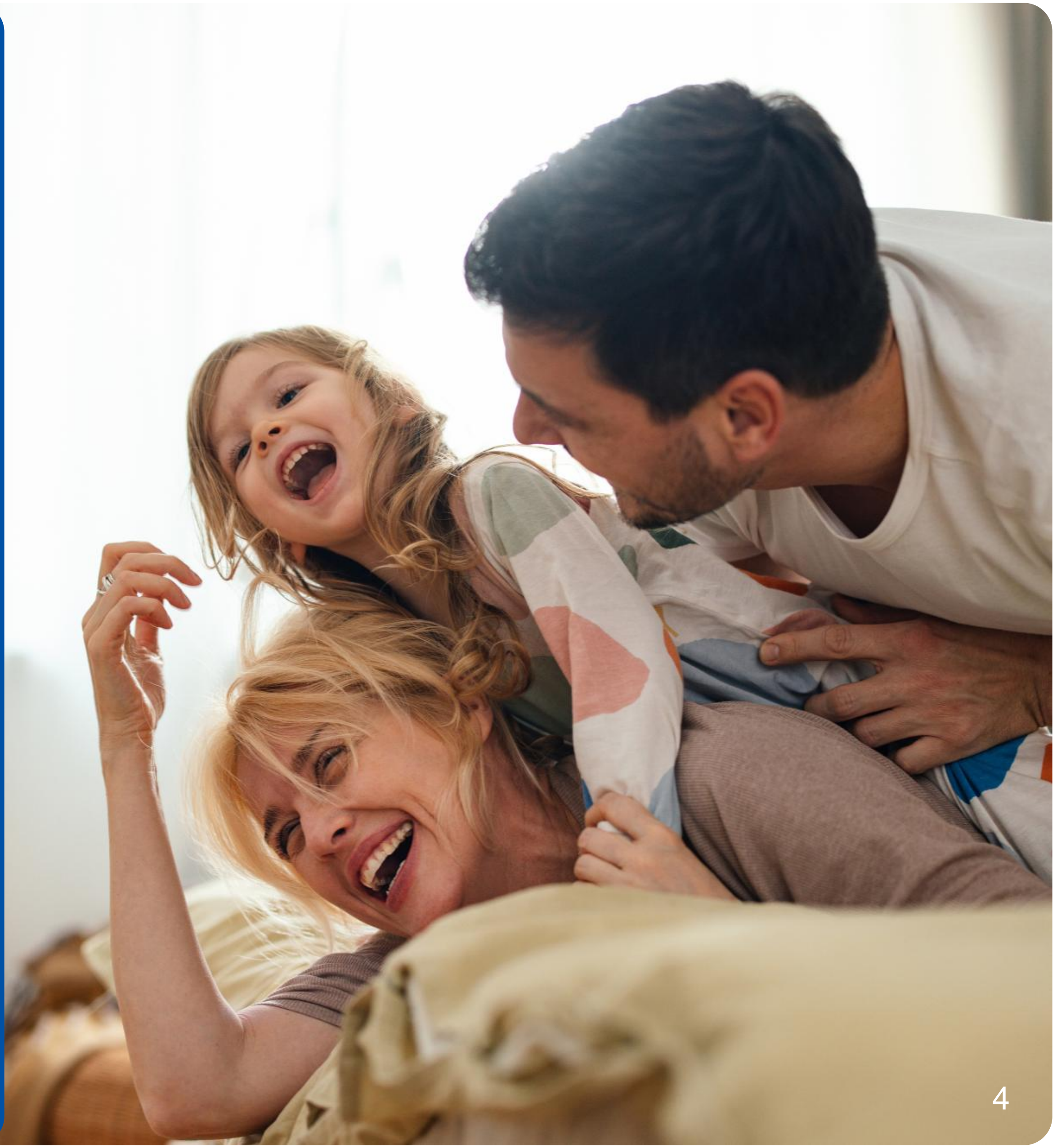
Your financial plan goes beyond investments and retirement to support the full spectrum of your life goals.

Financial Planning at RBC considers the whole you. We'll work together on strategies that focus on what matters most, taking into account your needs and those of your family.

Whether you want to focus on some or all of these strategies, we're here for you.

Eight ways
a Financial Planner can help you

1. Balance competing priorities
2. Reach your investing goals
3. Borrow smarter
4. Get tax-saving strategies
5. Protect your wealth
6. Prepare for retirement
7. Enjoy retirement
8. Define your legacy



Financial Planners deliver more

Canadians who work with an advisor tend to be more successful at building wealth and achieving their goals. Advisors have made a tangible difference in the lives of Canadians from all backgrounds and levels of wealth.

- Individuals with a comprehensive financial plan accumulate **2.7x more wealth** than those without one.[3]
- Canadians who work with a Financial Planner are **33% less likely** to be stressed about money.[4]

80%
of investors agreed that their advisor helps them stay disciplined with investing when the market is down and that they have better savings and investing habits due to their advisor.[5]

90%
of investors agreed that their advisor makes them feel more confident about reaching investment goals.[5]

Up to 131%
increase in savings seen by the average household that worked with an advisor for 15+ years, compared to a similar household without an advisor.[6]

3 Strategic Business Insights MacroMonitor 2020-2021 Report.
4 FP Canada Financial Stress Index, 2024.
5 Pollara 2024 Mutual Fund and ETF Survey.
6 Claude Montmarquette & Alexandre Prud'homme, 2020. "More on the Value of Financial Advisors," CIRANO Project Reports 2020rp-04, CIRANO.

RBC Global Asset Management – setting a higher standard

Diverse viewpoints and backgrounds thrive here.
Better investment decisions are the result.

Your partner in global excellence

$727B+[7] Global assets under management (AUM)

8 Cities

3 Continents

Canada's largest fund company[7]

225+ Mutual funds

200+[8] ETFs from RBC iShares[9]

2.9M+ Canadian investors

Investment management expertise

350+ Investment professionals

17 Investment teams

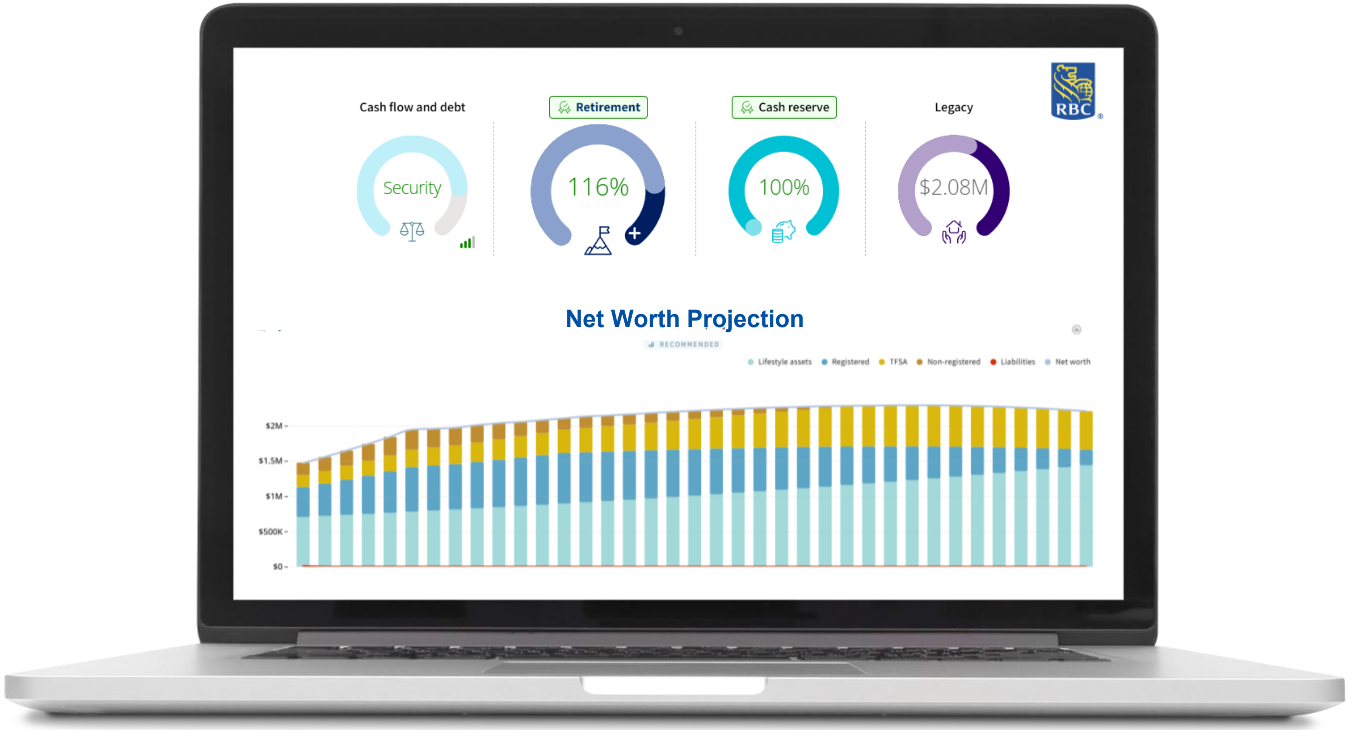
4 Specialty research and development teams

7 As of June 30, 2025. Based on Canadian assets managed by RBC Global Asset Management Inc. (Securities and Investment Management Association).
8 ETFs are offered through RBC Direct Investing Inc. (RBC Direct Investing) and RBC InvestEase Inc.
9 The RBC iShares alliance includes RBC ETFs managed by RBC Global Asset Management Inc. and iShares ETFs managed by BlackRock Asset Management Canada Limited.

The power of human connection and advanced technology

Our cutting-edge tools allow us to produce comprehensive, highly personalized financial plans.

By combining robust analytics, world-class tools, and the insight of our Financial Planners, we'll create a plan that is uniquely yours. Our technology helps uncover insights, model different scenarios, and optimize your strategy, while your Financial Planner ensures your personalized recommendation aligns with your goals, risk tolerance, and life priorities.



Visit rbcfinancialplanning.com for further information

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