RBC Advisor

A client-directed advisory program

Wealth Management

Take control of your portfolio

As an RBC Advisor client, your financial advisor can help you determine the asset allocation that works best for you, based on your investment objectives, time horizon and risk tolerance.

You will work with your financial advisor to create an individualized investment portfolio that you direct. Together you will: map out your goals, analyze your needs and develop a customized portfolio using a full range of investment options.

RBC Advisor is for investing clients who seek advice and want to participate in the investing process.

Benefits of the RBC Advisor program

With RBC Advisor, you make the decisions on what to buy, hold and sell with the professional guidance and advice from your financial advisor. Your advisor may draw upon firm research and experience, enabling you to be an informed investor. Your investments can be held in one easy-to-manage account.

Here's what you can expect:

- **Personalized wealth management advice** — Your financial advisor will help you develop an investment strategy that's suited to your needs.
- **Access to a wide variety of securities** — You can build your portfolio choosing from a wide array of asset classes including equities, fixed income, mutual funds, exchange-traded funds and many more.
- **No sales charges or transaction fees*** — A quarterly fee based on the value of assets invested will be assessed. Securities are purchased commission-free.
- **In-depth research** — With access to timely and concise research from RBC's research analysts, you can decide which investments are most appropriate for your situation.
- **Ongoing service** — You may stay current on your portfolio through regular reviews with your financial advisor, monthly statements and transaction confirmations.
- **Complimentary RBC Cash Management Account** — You receive access to the features of RBC Wealth Management's Cash Management Account, including check-writing, a Visa® Platinum Debit Card and other benefits, at no additional charge.

Simplify your life with RBC Advisor

Investing doesn't need to be a time-consuming and complicated process.

To learn more about RBC Advisor, contact your RBC Wealth Management financial advisor.

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.

*Certain mutual fund companies may impose short-term trading fees.

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