About RBC Wealth Management

Wealth Management

RBC Wealth Management provides access to a full suite of banking, investment, asset management, trust, insurance, credit/lending and other wealth management solutions. Our clients are financially successful individuals and families, businesses and institutional investors from North America to Southeast Asia. Globally, there is a combined total of more than US$983 billion in assets under management as of January 31, 2025, and approximately 4,800 financial consultants, private bankers and trust officers. Today, in the U.S., RBC Wealth Management is the 6th largest full-service wealth advisory firm based on assets under administration and number of advisors.[1]

Helping you reach your financial goals

At RBC Wealth Management, we take the time to understand your goals and offer wealth solutions to help you realize your life vision. We know what's important—the success of your family, personal aspirations and the legacy you want to leave behind—and we manage your wealth in a way that reflects your unique values.

Why investors choose RBC Wealth Management

When it comes to helping you manage your wealth, our character counts. As a client, you will work with a company with deep resources, a reputation for putting the interests of clients ahead of our own and a passion for helping transform the lives of the people we serve.

What you can expect

Our professional financial advisors deliver the customized strategies and attentive service you deserve. The experience is as much about helping you fulfill your sense of purpose through your wealth as it is about achieving your financial objectives.

Building wealth — Invest for retirement and other important financial goals.

Preserving wealth — Feel confident about your future financial security.

Enjoying wealth — Manage cash, use credit and lending facilities and create a steady income.

Sharing wealth — Create a meaningful legacy for the loved ones and causes you care about.

Business wealth management — Accomplish a wide variety of business financial objectives.

When you invest in the community, everyone gains

We also believe that responsibly managing the wealth entrusted to us by clients goes beyond financial stewardship. That is why we are proud to provide volunteers and offer financial support to worthy causes in communities across the country where we live and work. This includes industry leadership promoting clean water and diversity and inclusion initiatives.

Services for individual investors

RBC Wealth Management offers thousands of investment products, including many local, regional and international investment opportunities that may not be available from other firms. In the U.S., we have more than 2,200 financial advisors operating in 191 branches in 42 states. RBC Wealth Management also serves high-net-worth individuals and institutional clients worldwide with affiliates in Canada, the United Kingdom and emerging markets.

For more information, visit
www.rbcwealthmanagement.com.

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.

1. Quarterly earnings release (10-Q) from peer firms.

Asset management services

RBC Global Asset Management is a North American-based asset manager with global scope and industry-leading management capabilities. The RBC Global Asset Management group of companies has over US$983 billion in assets under management worldwide as of January 31, 2025.

For more information, visit funds.rbcgam.com.

Services for independent financial professionals

RBC Clearing & Custody provides clearing, custody and execution services to a variety of broker-dealers, including full-service wealth management firms, traditional retail brokerages, insurance agencies, institutional investment firms and FinTech businesses.

Custody services and a sophisticated wealth management and brokerage platform are also provided to a variety of registered investment advisors, including "breakaway" brokers, wealth management firms, institutional investment firms and dually registered firms.

In addition to processing transactions, maintaining records and fulfilling back office needs, a state-of-the-art technology suite and product platform is available to help financial professionals and their clients accomplish a broad range of wealth management goals.

For more information, visit www.rbccorrespondentservices.com and www.rbcadvisorservices.com.

1. Quarterly earnings release (10-Q) from peer firms.