

Simplify your life with Total Wealth



Wealth Management

At RBC Wealth Management, wealth planning is an interactive experience where you and your financial advisor have multiple options to build and share your plan. Providing information relevant to your unique situation is key to a quality wealth plan.

Your relationship with RBC Wealth Management begins by having a conversation about your unique goals, as well as your needs, wants and wishes. Together, we use this knowledge to create an RBC WealthPlan that helps you make meaningful and confident choices for today, tomorrow and beyond.

Total Wealth helps organize your information and delivers a comprehensive view of your financial life in one convenient place. With secure connections to thousands of financial institutions and access to a wide assortment of accounts—including checking, credit cards, life insurance, 401(k), mortgages and more—you and your advisor gain a more complete view of your financial picture.

Discover your Total Wealth

Total Wealth seamlessly connects to the accounts you would like to add. Your accounts and data are then verified and ownership is confirmed. Once authenticated, your Total Wealth is visible to both you and your advisor via your account on RBC Wealth Management Online and your RBC WealthPlan.

Upon selecting Add External Accounts, you select each relevant financial institution and enter your user credentials and complete any additional security steps. Once your External Accounts are connected, your Total Wealth will calculate on WealthPlan.

We work with Yodlee, our third party aggregation provider, for Total Wealth. If you have any questions on Yodlee's privacy policy please visit <https://www.yodlee.com/legal/privacy-notice>.

For assistance, call Client Support Services toll free at (800) 933-9946 weekdays from 8 a.m. to 10 p.m. (ET) and Saturday from 10 a.m. to 6 p.m. (ET).



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.