
# Take your vision to new heights with RBC Echelon

"What's next" is the question our clients never stop asking. You have a vision for the future, and our wealth planning process leverages RBC Echelon's extensive offerings to tailor a strategy designed to give you the most for your life, making a lasting impact and creating a legacy.

We understand that your wealth is a responsibility, both to the past and the people who built it, and to the future, and everyone who will thrive because of it. Through RBC Echelon, you have access to estate and trust planning services, credit offerings, and alternative and responsible investing programs. We offer business valuation services and tailored, comprehensive reporting, allowing you to achieve your vision for your wealth. Our lifestyle services of health care, philanthropy, family governance and travel and private aviation are available to provide you with holistic solutions extending beyond wealth strategies.*

## Where will your wealth take you?

From elevating your personal wealth priorities, sharing a lasting legacy or influencing positive change, we work with you to develop a structured plan designed around the preservation, growth and management of your wealth.

## How we work with you

Your financial advisor follows a planning process that includes working through the goals and objectives of your family over time. During your review, we identify opportunities in those goals to provide personalized solutions for any gaps that may exist in your overall wealth management plan.

## We focus on understanding what is most important to you

**Sustaining your lifestyle**

**Making an impact**

**Creating a legacy**

*These services are offered through third parties

**Understanding your goals and objectives —** We begin by listening. This helps us understand what is most important to your family.

**Gathering your current information —** Together, we look at what forms the big picture for your family. This includes your financial, business, assets and legacy background.

**Collaborating with your professional team —** We meet with your attorneys, tax advisors and estate planners to confirm all strategies are aligned with your goals and objectives.

**Developing customized strategies —** Next, we analyze the information we've collected to match your goals and objectives with sound strategies.

**Implementing thoughtful and creative solutions —** We develop customized solutions tailored to your objectives, drawing from a wide selection of products and services.

**Reviewing your strategies —** As your lifestyle, goals and markets change, we help you review your strategies to keep pace with those changes.

## Advice you can trust

Royal Bank of Canada (RBC) is one of the world's leading diversified financial services companies. RBC is among the top 5 largest banks in North America and the top 10 largest banks globally (as measured by market capitalization).* It has one of the highest credit ratings of any financial institution (Moody's Aa1, Standard & Poor's AA- and Fitch Ratings AA),** and it is consistently strong and stable with a high-quality balance sheet, proactive risk management and a strong liquidity position. As a result, RBC was a multiple award winner from Celent in 2021 for leadership in digitally onboarding clients and transforming business payments. RBC was also ranked number 2 in the global "Top 100 Most Diverse & Inclusive Companies" in the 2021 Refinitiv Diversity & Inclusion Index.

**Royal Bank of Canada is one of the world's leading diversified financial services companies.**

*As of January 26, 2023. Source: Bloomberg.

**RBC Capital Markets, LLC, is a wholly owned subsidiary of, and separate legal entity from, Royal Bank of Canada. Royal Bank of Canada does not guarantee any debts or obligations of RBC Capital Markets, LLC. Credit ratings are not recommendations to purchase, sell or hold a financial position in as much as they do not comment on market price or suitability for a particular investor. Ratings are subject to revision or withdrawal at any time by a rating agency.

## Collaborative relationships. Planning expertise. Personalized solutions.

RBC Echelon is an exclusive program for clients who have $20 million in assets, or more, with RBC Wealth Management. Contact your financial advisor for more information about expanding your opportunities and simplifying your life with RBC Echelon.

RBC Echelon™
Distinctive Wealth Solutions

Wealth Management

RBC Capital Markets, LLC, is a wholly owned subsidiary of, and separate legal entity from, Royal Bank of Canada. Royal Bank of Canada does not guarantee any debts or obligations of RBC Capital Markets, LLC.

Credit ratings are not recommendations to purchase, sell or hold a financial position in as much as they do not comment on market price or suitability for a particular investor. Ratings are subject to revision or withdrawal at any time by a rating agency.

Trust services are provided by third parties. RBC Wealth Management and/or your financial advisor may receive compensation in connection with offering or referring these services. Neither RBC Wealth Management nor its financial advisors are able to serve as trustee. RBC Wealth Management does not provide tax or legal advice. All decisions regarding the tax or legal implications of your investments should be made in connection with your independent tax or legal advisor.



23-86-00813_8636 (04/23)