Private Wealth Capabilities

RBC Echelon™
Distinctive Wealth Solutions

Where will wealth take you?

At RBC Wealth Management, our financial advisors have direct access to customized wealth management solutions needed to help families of significant wealth plan for both near-term strategies and big picture opportunities in the distant horizon.

Our philosophy starts with you

With the best investment management, technical know-how and global reach, our financial advisors offer truly personalized wealth counsel, backed by the deep expertise and financial integrity of one of the world's strongest financial institutions.

RBC Echelon puts you at the center of a broad set of capabilities

With a complete array of specialty services and products, we tailor a strategy designed to give you the most for your life, legacy and lasting impact.

Estate planning services

Philanthropy

Lifestyle extras

You, your family, your business

Responsible investing

Liquidity planning

Family dynamics

Estate planning services

Your financial advisor will work with you to develop a holistic understanding of the future you envision for your family, business and legacy.

- Our team has tax, trust and estate expertise to help design customized planning strategies
- Implementation and review of strategies to confirm continued alignment

Philanthropy*

Through RBC Echelon, you have access to a full suite of philanthropic advisory services, including:

- Development of philanthropic mission statement and vehicle selection, including direct gifts, donor advised funds and private foundations
- In-depth issue area research
- Grantmaking strategies and support

Responsible investing

- Align wealth to support specific family values
- Use ESG integration and impact investing
- ESG select portfolios, mutual funds, ETFs and separately managed accounts
- A full spectrum of financial, social, environmental and governance policy metrics

Envisioning what's next

RBC Echelon understands that being wealthy is only the beginning. It's where your wealth takes you that matters.

Liquidity planning

- Extensive cash management and lending programs
- Securities-based lending
- Dedicated banking solutions through City National Bank

Family dynamics

Access to deep expertise in all aspects of family dynamics, including:

- Identify how your family is positioned for successful wealth transfer
- Skill-building to enhance trust and communication within your family
- Defining roles and responsibilities, and implementing family governance best practices

Lifestyle extras*

Lifestyle services, including:

- Art advisory services
- Bill pay services
- Education consulting
- Personal and technology security
- Private aviation
- Private health advisory
- Risk management, including property and casualty solutions

RBC Wealth Management

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