

## More About Me



### Royal Mutual Funds Inc.

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### Experience

I have been in the financial services industry for 18 years.

### Community Involvement

I believe in giving back to the community by volunteering with different organizations within my neighbourhood.

### My Team

I am supported by a team of RBC professionals, including my FP Associate Raymond Isan Ali, who can be reached at 416-974-3547 to set up an appointment with me, or to manage other administrative support you might need. Please feel free to give him a call anytime.

# Bringing together your plan and our promise



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PFP®  
Financial Planner

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Financial  
Planning



## Offering clarity, convenience and confidence

### What I can do for you

Working with an RBC® Financial Planner starts with a conversation about you and your goals. Once I know what you're striving for, I can provide a written financial plan and help you implement it.

#### I can help you:

- Design a financial plan that assesses your current financial picture and reflects your long-term goals
- Support you as you implement your financial plan – managing both what you own and what you owe – so you can reach your goals with less effort
- Choose investment solutions and strategies that support your goals, risk tolerance and timeline
- Regularly review your financial plan and adjust it to your changing circumstances
- Reach your milestone goals such as retirement or paying for a child's education

## What makes up your financial plan?

With expertise in the following financial planning areas, I can help you address various aspects of your financial well-being in your plan.

#### Investment Planning

Drawing upon my extensive investment planning experience, I will work with you to implement investing strategies based on sound principles and your personal priorities. The plan will help you achieve your goals while remaining flexible enough to adjust as life changes.

#### Retirement Planning

Helping you to be financially ready to retire on your terms, or adjusting if the unexpected happens.

#### Estate Planning

Working with you to ensure your assets can be passed on in a timely, tax-efficient way.

## How We'll Work Together

Planning a successful financial future involves balancing your long-term objectives with your responsibilities today.

Identifying and managing your priorities is an essential part of financial planning, which is why RBC has established valuable practices that help ensure your needs are met today and in the future.

#### Your Future By Design®

This full-picture planning process will help us identify what is most important to you today, and into the future. It will help us guide your thinking, and allows me to get to know you better so we can create the best possible plan for you.

#### Implementing your financial plan

Financial planning is an ongoing process. Once we've written your plan based on your goals, we'll monitor your progress over the years and update the plan when needed.

As your Financial Planner I have access to a large team of highly qualified support professionals including accountants and lawyers who specialize in areas such as tax, estate, legal, government benefits, employer pensions and retirement.

I'm available and happy to meet with you wherever and whenever it's most convenient for you – whether that's at your home, workplace or a convenient RBC branch. Let me know the time and place, and I will work around your schedule.

**“Someone is sitting in the shade today because someone planted a tree a long time ago.”**

*– Warren Buffett*

## Reasons to choose RBC

- One of the world's leading diversified financial service companies
- Best-in-class tools and solutions
- Extensive resources and expertise in all aspects of financial planning
- Trusted Canadian brand with a long history of service and success