RBC Rochdale

Comprehensive Wealth Assessment (CWA) Service

Comprehensive Wealth Assessment is a complimentary, holistic service offered in collaboration with your advisor to identify gaps and solutions and empower you to make educated choices about how you want to optimize your wealth. Our approach encompasses what we refer to as the ***Strategic Pillars of Wealth***.

These pillars enable us and your advisor to expand wealth analysis and recommendations into areas that are often ignored or forgotten.

Investment Planning
Customize your Approach
Implement portfolio strategies that address your unique risk tolerance, diversification, time horizon, cash flow and retirement needs.

Asset Protection & Risk Management
Reduce Risk and Safeguard Your Wealth
Review asset titling to identify ways to further mitigate risk from creditors; assess life and other insurance policy enhancement opportunities.

Income Tax Considerations
Understand Your Tax Exposure
Assess your financial strategies to understand your tax liability and make informed decisions.

Philanthropy
Make an Impact
Create your legacy through planned giving strategies.

Estate & Legacy Planning
Manage your Wealth and Legacy
Maximize net to heirs and charities, understand the tax impact, and maintain financial independence.

Non-Deposit Investment Products: • Are Not FDIC Insured • Are Not Bank Guaranteed • May Lose Value

IMPORTANT INFORMATION

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