

OVERVIEW

# Private Wealth Solutions

Intelligently personalized services offered in collaboration with your advisor to support you with more complex wealth issues.



Advanced estate, income tax, asset protection, and philanthropic strategies for UHNW and business owner clients.

Strategic, objective, and experienced transition advice to private business owners.

Customized investment solutions with portfolio management for individuals, families, and institutions.

**Reach out to your Financial Advisor to learn more about how RBC Rochdale can help identify gaps and offer solutions.**

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