The Rosenwald Team

Strategic planning for all stages of life

- Access to trusted professionals within our network
- Consolidation of assets
- Access to FamilyWealthPlanner
- Analysis of your overall financial situation
- Define investment objectives
- Establish a risk profile and investment horizon
- Retirement income planning
- Coordination with retirement facilities
- Access to Retirement Funding Sensitivity
- Advice on Social Security, Medicare, pensions and annuities
- College savings plans
- Custodial accounts
- Business succession planning
- Tailored, goal-based investing
- Risk based asset allocations
- Abide by the fiduciary standard
- Advanced portfolio management
- Methodical portfolio rebalancing
- Tax and cost-conscious investment strategies
- Replenish and monitor cash reserves
- Investment due diligence
- Select best-in-class asset managers
- Coordination with CPAs/accountants
- Consistent performance reporting
- Consolidated reporting of all assets
- Asset protection planning
- Life insurance analysis and review
- Long-term care insurance analysis and review
- Disability insurance analysis and review
- Liability analysis and review
- Innovative lending solutions
- Implementation of tax efficient strategies
- Annual consolidated tax reporting
- Coordination with attorneys
- Tax-loss harvesting to minimize capital gains
- Advice on HSA and FSA
- Strategies for maximizing retirement assets
- Charitable gifting
- Family gifting
- Trust administration
- Estate administration and distribution
- Consistent in-person meetings
- 24-hour secure online account access
- Access to broad global insights
- Cash flow management
- Coordination with home care providers
- "Investing 101" for Generation Y and Z
- All-in management and advisory services
- Act as a fiduciary on your behalf
- Exclusive educational and entertainment events throughout the year

The Rosenwald Team
A Multigenerational Wealth Management Practice

RBC Wealth Management

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.

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