Financial Literacy Program

RBC Wealth Management

At RBC Wealth Management, we recognize the importance of helping to build financial literacy among our clients and their families. Formal financial education, when combined with sound advice and practical learning, can help set the stage for a lifetime of informed and confident financial decision making for you and your family.

Our Financial Literacy Program is a practical, comprehensive, 20 module learning platform. Work through each module and learn the basics of Wealth Management:

Section #1- Earnings & Savings

- Module #1- Budgeting Money
- Module #2- Income & Taxation
- Module #3- Banking Services
- Module #4- Interest
- Module #5- Credit
- Module #6- Account Types

Section #2- Wealth Planning Basics

- Module #7- Planning Benefits
- Module #8- Wealth Stage Plans
- Module #9- Financial Documentation

Section #3- Investing

- Module #10- Asset Classes
- Module #11- Markets and Investment Vehicles
- Module #12- Risk and Diversification
- Module #13- Risk Tolerance Profile
- Module #14- Building a Portfolio
- Module #15- Understanding Fees

Section #4- Advanced Planning

- Module #16- Will and Estates
- Module #17- Insurance
- Module #18- Charitable Giving
- Module #19- Trusts
- Module #20- Wealth Transfer

RBC Dominion Securities Inc.