

■ THE CAPITAL REGION
FINANCIAL LEADERS

As Seen In... *Forbes*, May 26, 2014

Financial Consulting for Life

The Linn Group at RBC Wealth Management®

Chess grandmasters often think 10 steps ahead, or more. Anticipating the consequences of each possible move and countermove is critical to success. That is equally true when it comes to managing wealth.

“Anyone can get unlimited information but may not know what decisions to make,” says financial advisor Bob Linn, senior vice president, The Linn Group at RBC Wealth Management in Rockville, Maryland. “Tax rules are complicated and changing. Or, you can look at a mutual fund report, but if you don’t know anything about the manager, you won’t understand how the numbers are achieved.”

“The world is filled with uncertainty, and the rules are going to keep changing over time. We help our clients adapt.”

—Michael Riley, CFP®
Senior Financial Associate

Linn, former captain of the University of Maryland Chess Team, is a self-described strategist who still competes in bridge and Scrabble, and has represented the United States in the World Scrabble Championship three times. He applies those same analytical skills to helping clients make prudent decisions with their money. But The Linn Group offers more than investments.

“Eighty percent of our time is spent advising clients on an array of matters



Michael Riley (left) and Bob Linn

that have nothing to do with investments, but everything to do with their financial well-being,” Linn says. “We take into account the client’s career direction, legacy planning, rental properties, business contracts, family situation and other issues. Life decisions are more important to successful results than investment decisions.”

Linn is an Accredited Wealth Manager (AWM), which means he has the training necessary to serve a wide range of client needs.

“We are financial coaches,” adds Michael Riley, CFP®, senior financial associate. “The world is filled with uncertainty, and the rules are going to keep changing over time. We help our clients adapt.”

Comprehensive, Objective

Linn and Riley work together as a team, *both* getting to know each client

thoroughly before recommending a plan, and then monitoring and adapting the strategy as circumstances change.

“Clients get the advantage of both our brains—mine with 45 years’ experience plus Michael’s with 10 years’ experience and being a CFP,” Linn says. “Both of us add to the solution.”

As an affiliate of Royal Bank of Canada, The Linn Group enjoys access to the research, resources and experience of one of the world’s strongest banks. At the same time, The Linn Group offers objective advice it believes to be in the client’s interest. Linn and Riley

rarely recommend investments they do not personally own.

The Linn Group’s ethical standards are among the highest in the industry. For 28 years, Linn has served on five corporate boards of directors. He is also in his 25th year as an arbitrator for the New York Stock Exchange and the Financial Industry Regulatory Authority (FINRA).

“I have nothing to retire from,” Linn says. “I love my job taking care of clients who are now friends, including four generations of one family.”

“We offer the horsepower of a big firm,” Riley adds, “and the feel and culture of a small one.”

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