



Respect — Our service is personal, responsive and we strive to exceed your expectations.

When you make the decision to work with us, it is a responsibility we take seriously. Developing a financial strategy that addresses your immediate needs and helps position you and your family to meet your long-term financial goals is just one aspect of our role as your financial advisors. We are also committed to understanding your communication preferences and providing you with the types of services you desire.

Monitoring your progress

Once your plan is in place, you receive ongoing communications to report on the progress of your plan and the performance of your investments. RBC Wealth Management's rigorous performance reporting process includes:

- **Online account access** — To experience our client website firsthand, visit www.salzmanzimmermangroup.com and click on the "Take a Tour."
- **Detailed statements** — Available online and/or mailed to your home.
- **Quarterly performance reports** — Relative to your goals and objectives including index benchmarks.

Keeping you informed

Offering you information for the purpose of educating and providing you with practical financial advice is equally important. Through RBC Wealth Management, we are able to offer you access to resources and tools that help inform and keep you current on the latest changes and trends in the financial markets that may impact your financial strategy.

We are happy to provide additional information on any of the topics below.

- Services offered
- Wealth management plan
- Portfolio reviews
- Asset allocation analysis
- Timely research
- Market commentary
- Quarterly newsletters
- Educational seminars
- Organizational binder for financial documents
- Coordination with tax professional and attorney