

Value proposition



Wealth
Management

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When I meet with new clients, I sometimes find they have not fully engaged a financial advisor and are therefore unaware of just how a financial advisor can benefit them. Here is a list of services I provide to my clients that highlight the value of working with me:

- Investment selection/recommendation
- Retirement planning
- The ability to explain complex concepts to clients in understandable ways
- Implementing strategies beforehand to help deal with difficult markets
- Helping you determine where you are in relation to your goals
- Investment/portfolio reviews (including calculation of rates of return)
- Investment updates
- Market overviews
- Understanding each client's needs and objectives as well as their risk tolerance
- Investment strategies and disciplines
- Over 20 years of bear and bull market experience
- Over 20 years of experience working with a wide range of clients
- A reputation for honesty and integrity
- Helping you maintain balance regardless of market conditions
- Full disclosure on how and how much you pay for my services before you make the decision to work with me
- Knowledgeable referrals to other qualified professionals, such as accountants and attorneys
- Patience — After giving advice I respect my clients varying need to process what we discuss before reaching a decision
- Annuity reviews
- Life insurance reviews