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Flader Wealth Consulting Group



Allan J. Flader

It's been a tough couple of years for financial services. Among the scandals and schemes, investor confidence and trust are at an all-time low. Many professional consultants buckled under the pressure of performing under such circumstances. But Allan J. Flader looked at it as an opportunity.

Flader, CIMA®, AIF®, CRPC®, Senior Vice President – Financial Consultant, is the founder of the Flader Wealth Consulting Group of RBC Wealth Management located in Phoenix, Ariz. Having provided sound financial advice for over 23 years, he knows the value of strong client relationships. "During the down market periods, we proactively reached out to our clients to address their concerns. We didn't shirk away from our responsibility to help them through the difficult times but chose to face it head on," says Flader.

Flader takes the time to know his clients beyond the file lying on the desk. Each client is treated individually. Each solution set is developed and implemented to meet specific goals. "Nothing irritates me more than a cookie-cutter approach," Flader states.

Flader takes each of his clients beyond simple asset management through a complete statistical analysis of risk and reward, and attempts to minimize risks through diversification, asset allocation and well-informed decision making. He believes the other aspects that set him apart are the time spent on each and every portfolio, how he reaches into alternative strategies, and how he researches and initiates the most tax-favorable choices on an account-by-account basis.

But he doesn't do it alone. As one of the top five RBC Wealth Management practices in the U.S., Flader Wealth Consulting Group is comprised of partners who carry the CFP® and CRPC® designations and represent all areas of wealth management. The team combines their collective skills to provide powerful, comprehensive wealth management consulting. Every client situation is regularly reviewed so that each team member is able to service the client equally. This helps them provide exceptional service because clients can speak to any team member about their investments.

Clients also benefit from the breadth of services offered through Royal Bank of Canada (RBC), the parent company of RBC Wealth Management. RBC is recognized globally for its enviable Aaa rating and top-of-the-line resources.

Because of its size and stature, the Flader Wealth Consulting Group also has access to industry-leading analysts, money managers and researchers who identify world-class, non-proprietary options to help solve even the most sophisticated financial situations. "We really do have the best of both worlds," states Flader. "We have a strong team comprised of bright, honest, dedicated people who are accessible locally as well as having access to powerful global resources."

To sum it all up, Flader adds, "The past several years have changed the world of investing. What used to work in the past might not work now. New strategies are needed to survive. Our goal is to help ensure portfolios are comprised of assets that perform well even when the markets do not. We are definitely a one-of-a-kind wealth management team."



from left to right: Chris Young, Joanne Lane, Brian Flader, Allan Flader, Linda Caldwell, Michael Flader

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