

## MORE THAN MONEY

Heide Wealth Management Group's goal is to create an exceptional client experience.



**Left to right:** Trevor Heide, Financial Advisor; Daniel Jakuta, ChFC®, Senior Vice President - Financial Advisor, Senior Portfolio Manager - Portfolio Focus; Tina Wilson, Branch Service Manager/Senior Investment Associate; Vanessa Poppie, Associate Vice President - Financial Advisor; David Heide, CFP®, Managing Director - Financial Advisor, Senior Portfolio Manager - Portfolio Focus; Heather Ashmore, Senior Registered Client Associate; Caleb Hanie, Financial Advisor; Kristin Cappel; Adam Fein, AAMS®, Senior Financial Associate; Jeff Neumann, Senior Vice President - Financial Advisor, Senior Portfolio Manager - Portfolio Focus; and Joseph Palumbo, Senior Vice President - Financial Advisor, Senior Portfolio Manager - Portfolio Focus.

“Long-term financial relationships are built on trust that comes with integrity, hard work, and service,” says David Heide, CFP®, a financial advisor with Heide Wealth Management Group at RBC Wealth Management.

With shared values, Heide Wealth Management Group's 11-member team has 150 years of combined experience. The team believes that service and financial success can—and should—go hand in hand.

### Responsive with Attention to Detail

The team's mission is to listen to clients, understand their

unique needs, build a roadmap for their financial futures, and assist them through life's journeys. The financial advisors carefully research market reports from RBC Capital Markets, Credit Suisse, and Argus Research, allowing them to build discretionary portfolios of individual stocks and exchange-traded funds. RBC Wealth Management is a division of RBC Capital Markets, LLC, giving clients access to more RBC products and services—an asset for clients wanting big-firm solutions with a small-firm feel.

“We provide our clients with the local, small-firm experience yet have many global resources

available to provide them with a wealth plan to help achieve their financial goals and dreams,” Heide says. “We understand what's happening with each asset and share our knowledge with our clients. These tools

are invaluable for our clients to make important decisions with confidence.

“It's an efficient way of managing wealth for our advisory clients. They know what they own and what the fee structure is,” he adds.<sup>1</sup>

Moreover, this in-depth research helps strengthen client relationships that the Heide Wealth Management Group works hard to cultivate.

### More than Money

Through its responsiveness and attention to detail, Heide Wealth Management Group offers additional services like securities-based lending<sup>2</sup> and the RBC wealth planning tool, which provides a retirement probability analysis and a goals-oriented plan based on factors like inheritance, rental income, and real estate.

“We design a portfolio followed with ongoing management and day-to-day customer service,” Heide says. “Our team approach, with the backing of RBC Wealth Management, results in customized solutions and a level of client support that's critical in today's rapidly changing financial environment.”



**Wealth Management**  
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<sup>1</sup> We generally monitor your advisory account for you periodically (typically each quarter) as part of our advisory services in accordance with the terms of your advisory agreement with us. Our financial planning services are limited to preparation of a financial plan based on the information that you provide, and do not include ongoing monitoring. We do not monitor your brokerage account investments for you.

<sup>2</sup> Securities-based loans involve special risks and are not suitable for everyone. You should review the provisions of any agreement and related disclosures, and consult with your own independent tax and legal advisors about any questions you have prior to using securities-based loans or lines of credit. Additional restrictions may apply.

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