Orlando Lopez, CFP, CIM, CIWM

Investment Advisor & Financial Planner

Orlando Lopez, CFP, CIM, CIWM
Investment Advisor & Financial Planner
Tel: 416-699-0185
orlando.lopez@rbc.com

RBC Dominion Securities
45 Wicksteed Ave, Suite 210
Toronto, ON M4G 4H9
Tel: 416-699-0185
www.orlandolopez.ca

Hi, my name is Orlando and I wanted to take a moment to introduce myself with my story. I hope to get to learn about your story and helping to protect the legacy of you and your family.

The "why"
At the core of my practice is a commitment to bringing my knowledge and experience to my client's wealth journey, to help guide them in making sound financial and investment decisions. For me, it all boils down to the intersection of people and life. My primary goal, and that of the firm's, is to customize each client's financial plan to align with their needs. I consciously make a sincere effort to learn about your family relationships and dynamics to help understand your "why."

The "how"
I am dedicated to helping clients being strategic with how they grow and protect their net worth. An in-depth analysis of one's current cash flow and future budgets is where we begin - while I admit it is not always as exciting as investments, it is the most underrated personal finance exercise. We then review the impact of tax on one's cash flow, and if there are alternative ways to make your finances more tax-efficient. An investment review follows, to complement the cash flow needs we uncovered earlier.

My story
I graduated with a Bachelor of Commerce from York University in 2008, and subsequently embarked on a career in finance at one of the "Big Five" Canadian banks before joining RBC Dominion Securities in 2019. I have been featured on the Business News Network (BNN) and interviewed on the radio, as well as quoted in print media. On a personal note, my lovely wife and I have a boy and girl - Amelia and Nolan. When not busy running after them, you can find us planning vacations to help them discover the world. Along with volunteering for various charitable endeavors, I also lectured in finance at my alma mater to undergraduate students. Family and friends have described me as having a passion for helping individuals build their wealth with tools that will add value to your financial journey. Let's get started with a phone conversation.

Wealth Management
Dominion Securities