

**From:** Marketplace  
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Welcome to the second edition of **The Update**, brought to you exclusively by RBC Clearing & Custody. The Update helps you stay current on the latest happenings in the **RBC Marketplace** by highlighting new vendor additions, new preferred pricing arrangements, and updates to existing Marketplace vendor solutions.

In this edition, we are excited to announce five new additions to the RBC Marketplace.

### RBC Marketplace Announcements



#### RightCapital

RightCapital's mission is to create Right Plans for Real People™. Founded in 2015, RightCapital is the fastest-growing financial planning software, with the highest user satisfaction rating among financial advisors (Source: [The Kitces AdvisorTech Study](#)). From interactive retirement planning and tax-efficient distribution strategies to insurance evaluation, student loan management and estate planning, RightCapital simplifies the complexity of financial planning to help advisors grow their practices and set clients on the right path to financial success.

#### Learn More:

<https://www.rightcapital.com/features/>

#### Vendor Contact Info:

[sales@rightcapital.com](mailto:sales@rightcapital.com) or (888)982-9596 Opt. 1

#### RBC Preferred Pricing:

Reach out to your RBC C&C contact for preferred pricing information.



#### Wealthbox

Wealthbox® is a CRM platform for financial advisors. Integrated with leading custodians and wealth-tech partners, Wealthbox is known for its modern product design and powerful yet intuitive user experience. The collaborative workspace technology allows financial advisors, enterprise RIA firms, and broker-dealers to manage client relationships and streamline operations to grow their practices.

#### Learn More:

<https://www.wealthbox.com/>

#### Vendor Contact Info:

[Wealthbox Sales team](#)

#### RBC Preferred Pricing:

Reach out to your RBC C&C contact for preferred pricing information.

### What is RBC Marketplace?

RBC Marketplace brings together all the technology and product solutions from RBC and third-party vendors that you and your financial professionals can use to tailor your own customized offering. Visit our free Marketplace website to browse the offerings.

[Visit the RBC Marketplace here](#)



### Need a Second Opinion?

RBC now offers complimentary technology consulting to help your firm make the most out of your tech investments. Whether its understanding all that RBC has to offer or optimizing your overall technology stack, we can help.

RBC Technology Consulting can help you navigate and understand the tech tools that RBC C&C has to offer. In addition to being experts on RBC's technology



### **Rocket Mortgage**

Rocket Mortgage® is an online mortgage experience from America's largest mortgage lender. Rocket Mortgage® is not a calculator; it is a way to get a mortgage. Financial professionals now can offer preferred pricing and special incentives to their clients on conforming mortgages through Rocket Mortgage®.

#### **Learn More:**

To get started on a mortgage journey, financial professionals can direct their clients to an exclusive website: <https://www.rocketmortgage.com/partners/vip/rbcclearing&custody>.

#### **Questions:**

Please email [mortgages@rbc.com](mailto:mortgages@rbc.com).

#### **RBC Preferred Pricing:**

Reach out to your RBC C&C contact for preferred pricing information.

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### **Investorlink**

Investorlink is a technology platform that connects financial advisors with the equity and municipal primary capital markets. Since their founding, they have made available nearly 1,100 IPOs, follow-ons, SPACs, and new issue municipal offerings to financial advisors across the country. Investorlink requires no minimum participation and they split the commissions paid with the broker-dealers on the buy-side of the marketplace.

#### **Learn More:**

[www.investorlink.io](http://www.investorlink.io)

#### **Questions:**

Contact [Investorlink](#)

#### **RBC Preferred Pricing:**

Reach out to your RBC C&C contact for preferred pricing information.

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## **Stevens & Lee**

Powerful partnerships. Standout solutions.

### **Stevens & Lee – Senior / At Risk Investor Program**

Stevens & Lee is among the 250 largest law firms in the country, with more than 195 lawyers serving clients from 16 offices. Stevens & Lee offers a variety of services, including Senior Outsourced support that provides a suite of services to firms related to senior/at risk investors: advisory counseling, intervention, regulatory and litigation support. [Richard Szuch](#), the former Enforcement Chief for the New Jersey Bureau of Securities and the former Chair of the North American Securities Administrators Association's Seniors Issues Committee, and [Ron Long](#), the former Wells Fargo, enterprise-wide Head of Aging Client Services co-lead this program.

#### **Learn More:**

<https://www.stevenslee.com/service/senior-investor-compliance-services/>

#### **Questions:**

Contact [Richard C. Szuch](#) and [Roland Long](#)

#### **RBC Preferred Pricing:**

Reach out to your RBC C&C contact for preferred pricing information.

offerings, this team also has deep knowledge of third-party vendor technology solutions based on their experience working with hundreds of fintech vendors and other independent firms, like yours.

Take advantage of this complimentary service by emailing [c&ctechconsulting@rbc.com](mailto:c&ctechconsulting@rbc.com)

### **Tech Help @ RBC**

#### **Field Services Group**

*"How do I" questions?*

M-F 8 a.m. – 7 p.m. CT

(800) 949-0242

#### **Technology Services Group**

*Connectivity questions*

M-F 8 a.m. – 8 p.m. CT

(833) 820-3276

#### **Technology Training**

Visit [RBCtrain.me](http://RBCtrain.me) to book your own technology training session.

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