



NEWS RELEASE

RBC CORRESPONDENT SERVICES AND RBC ADVISOR SERVICES LAUNCH NEW WEALTH MANAGEMENT TECHNOLOGY PLATFORM

*RBC BLACK offers integrated access to the technologies of
five leading financial services providers*

MINNEAPOLIS, Minn. (May 2, 2017) – RBC Correspondent Services, one of the nation’s largest clearing firms for independent broker-dealers, and RBC Advisor Services, a premier custodian boutique for registered investment advisors, today announces the launch of BLACK, a new integrated financial advisor platform.

Within BLACK, RBC has bundled five leading financial services technology providers into one simple, intuitive platform. Accessible through a single login, on most devices, BLACK is offered to RBC’s clearing & custody clients with a strong desire to leverage the power of technology to enhance client relationships and grow their business.

BLACK represents a unique and expandable platform containing a full menu of wealth management solutions developed by the following industry leading financial technology partners:

- CircleBlack – Client Account Aggregation and Portfolio Analytics
- Redtail – Customer Relationship Management
- Riskalyze – Risk Alignment
- MoneyGuidePro – Financial Planning
- Vestmark – Trading and Rebalancing
- RBC – Clearing and Custody

“The BLACK platform truly addresses the needs of our independent broker dealers and registered investment advisor clients,” said Brett Thorne, head of RBC Correspondent Services and RBC Advisor Services. “The world of financial services along with technology is rapidly changing. We wanted to build an exclusive advisor platform to help our firms and their advisors realize opportunities, gain efficiencies and thrive in this new environment.”

Financial advisors who leverage BLACK will be able to deliver financial solutions with their clients’ goals and values at the forefront. The integrated applications on BLACK allow advisors to streamline client interaction, while offering a wider array of capabilities.

“CircleBlack worked closely with RBC to design and build BLACK specifically for RBC’s clearing and custody clients,” said John Michel, CEO of CircleBlack. “BLACK is a cutting edge platform, built on the latest scalable web technologies and seamlessly enables secure data flow between all the partners.”

About RBC Correspondent Services and RBC Advisor Services

RBC Correspondent Services is the third-largest clearing provider based on number of broker-dealer clients in the United States. The business specializes in providing comprehensive clearing, custody and execution services to independent broker dealers and their advisors who seek knowledgeable support, powerful trading tools and platforms, expanded investment choices, compelling advisor development programs and high quality proprietary research.

RBC Advisor Services is a full-service custody partner for RIA firms. RBC AS provides tailored access to a sophisticated wealth management and brokerage platform. Offering capabilities and solutions of an industry leader and providing personalized service and support in helping advisors manage their clients’ wealth.

RBC Correspondent Services and RBC Advisor Services are divisions of RBC Capital Markets, LLC, Member NYSE/FINRA/SIPC, a wholly owned subsidiary of, and separate legal entity from, Royal Bank of Canada.

For more information, please visit www.rbccorrespondentservices.com or www.rbcadvisorservices.com.

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