



Reva Shakkottai, CFA[®]

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A commitment to you

I am dedicated to addressing the complex financial needs of high-net-worth investors. Every service I provide and every solution I offer is directed toward helping preserve and grow my clients' wealth.

I work with my most valued clients, like you and your family, to gain a deep understanding of what really matters most in your life: your needs, lifestyle, values, goals and personal sense of purpose. My recommendations encompass growing assets, managing risk, creating an income stream during retirement or creating your legacy.

Choosing the right advisory relationship can be as important as choosing the right investment strategies and asset allocation. I am a versatile, flexible advisor who is proactive and hands-on with the ongoing management of your investments. I describe my investment approach as opportunistic, utilizing the vast resources of the global marketplace.

I skillfully collaborate with you and your many professional advisors, such as your accountant and attorney, to help ensure that the goals of your family are accomplished. I have found that collaboration enables you to understand each advisor's role and creates a team approach in helping you plan for the future. While we are all experts in our respective fields, the services we provide often affect the work we are all doing on your behalf.

These collaborative relationships have allowed me to help numerous clients manage their assets and achieve their financial goals. I am proud that the majority of my clients have come through referrals from other clients or the professionals with whom I partner.

As a client, you will benefit from the high level of attention you receive from me along with the wide array of financial solutions available through RBC Wealth Management and our parent company, Royal Bank of Canada.

RBC Wealth Management,
a division of RBC Capital Markets, LLC,
Member NYSE/FINRA/SIPC.



**Wealth
Management**

Non-deposit investment products offered through RBC Wealth Management are not FDIC insured, are not a deposit or other obligation of, or guaranteed by, a bank, and are subject to investment risks, including possible loss of the principal amount invested.



My approach

High-net-worth investors face more complex issues and have greater opportunities available to them than most people. My process includes a disciplined approach to reviewing, prioritizing and addressing 13 key wealth management issues:

- Investments
- Wealth protection
- Managing liabilities/liquidity needs
- Qualified retirement plans
- Stock options
- Business owner interests
- Cash management
- Gifting to children/descendants
- Charitable giving during life and at death
- Titling of assets
- Executor/trustee relationships
- Distribution of wealth at death
- Mitigating risk via insurance

While the decisions you and your family face are important, with help from me and my team at RBC Wealth Management, these tasks will not be as daunting as they may seem. My integrated approach to wealth management can ensure your assets are thoughtfully managed while being mindful of tax and estate implications.

Biography

Reva Shakkottai, CFA®

Reva is a seasoned financial advisor and portfolio manager based in Los Angeles, California. Her strategies for growing and protecting wealth have been featured on *CNBC*, *Fox News*, *Fox Business Network*, and in *Marie Claire*, *On Wall Street* and *Los Angeles Business Journal* as well as other business media.

Reva brings the distinction of having an extensive background in finance and economics. Since 1997, she has managed equity and fixed income portfolios for high-net-worth investors, corporate executives and owners of middle market companies. Before joining RBC Wealth Management, she worked at some of the largest, most prestigious firms on Wall Street, including Lehman Brothers/Neuberger Berman, Bank of America and Sanford C. Bernstein & Co.

A graduate of the University of Southern California with a Bachelor of Science degree, cum laude, in business administration, Reva earned her MBA in finance from the UCLA Anderson School of Management. She is a Chartered Financial Analyst® and a member of the CFA Institute and CFA Society Los Angeles. The CFA charter is the most globally recognized credential measuring the competence and integrity of financial analysts and portfolio managers.

Reva lives in Manhattan Beach, California and is on the UCLA Anderson Alumni Board of Directors, where she represents her graduating class as alumni class president. She is on the board of directors of Wayfinder Family Services and a member of the Finance Committee, which oversees the endowment. She is also a member of the Beverly Hills Estate Planning Council, which collaborates on progressive estate planning techniques.

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