

Recent Changes

Communication method update

Updated: March 31, 2021

From time to time, we update various documents to reflect new products & services, new regulations, or other changes.

We've introduced a new location where you can find the most up-to date versions of important documents related to your account, including the Relationship Disclosure & Agreement (RDA), at www.rgfwealth.com/our-relationship. You can always visit this link, or go to www.rgfwealth.com, click on Client Centre and 'Our Relationship'.

This communication method update has been included in the latest version of the RDA.

CASL clarification for existing RGF clients

Updated: February 24, 2021

The Relationship Disclosure & Agreement (RDA) has been updated to clarify the difference between marketing communications such as our newsletter or blog, versus client communications regarding changes to products or services, or other announcements relevant to your relationship with the firm.