



# Your affluent clients deserve our best



An estimated \$3 trillion in wealth will change hands this decade, either in the form of inter-spousal or inter-generational transfers.<sup>1</sup> A significant portion may also seek better service from a new advisor.

Now is the time to reinforce relationships with your high-net-worth (HNW) clients and ensure you have an attractive offering for newly wealthy prospects.

Mackenzie Investments understands the unique issues facing the Canadian HNW investor. Mackenzie Private Wealth provides **elevated solutions with elevated support** that can help you take them to the next level of service.

## Elevated portfolio expertise

For more than 20 years, Mackenzie Private Wealth has helped Canadian advisors elevate their practice and build finely tuned portfolios for their clients.

With 16 investment boutiques globally, we provide a wide breadth of offerings – from core fixed income and equities to new and innovative solutions in ETFs, alternatives, and sustainable investing. We have the building blocks you need to construct a well-diversified portfolio with your HNW client in mind.

The program gives you access to a dedicated Portfolio Manager, supported by the Mackenzie Multi-Asset Strategies team, to help you and your clients develop a modern portfolio to suit their unique financial plans.

## Elevated support

Advisors know their clients best. That's why those who work with us retain control of their client relationships.

Mackenzie Private Wealth provides advisors with the tools to deliver exceptional wealth management experience through our unique advisor focused platform.

You'll have access to the expertise of our Tax and Estate Planning Team, whose strategic tax, estate and philanthropic services can help you build a comprehensive plan to meet your clients' wealth management goals.

Your dedicated Mackenzie Private Wealth Account Manager will create proposals, assist with account onboarding and provide ongoing service.

## Elevated HNW expertise

Many advisors build their clients' wealth by diversifying across several investment managers. However, at higher asset levels clients may benefit from working with one firm, receiving comprehensive service that include:

- A diverse set of investment managers both within Mackenzie Investments and from selected external sub-advisors
- Asset allocation and risk management across household accounts
- Consolidated household reporting
- Philanthropy
- Tax and estate planning

### Mackenzie Private Wealth supports

300+ advisors (and rising)

700+ HNW households

\$1 billion+ AUM

For more information about Mackenzie Private Wealth contact your Mackenzie Investments Sales Team or visit us at [mackenzieinvestments.com/private-wealth](https://mackenzieinvestments.com/private-wealth)

<sup>1</sup> 2021 Investor Economics Household Balance Sheet Report.

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