

Macquarie Private Wealth

A world of opportunities



MACQUARIE


SHARING A COMMON GOAL

THE MACQUARIE LIBERTY ACCOUNT

About Macquarie

Founded in Australia in 1969, the Macquarie Group has always been committed to continuous growth. Since 1992, this global provider of banking, financial, advisory, investment and funds management services has reported successive years of profits and growth.

Macquarie Private Wealth offers investors tailored financial solutions, award-winning research, recognized financial strength, and a global vantage point — a world of opportunities to build your personal wealth.

 Toll-free 1 866 775 7704

 macquarieprivatewealth.ca

Macquarie Private Wealth is pleased to offer The Macquarie Liberty Account, a convenient and powerful investment platform that delivers the functionality and flexibility of a full-service brokerage account for a single, asset-based fee. A Macquarie Liberty Account allows you and your Investment Advisor to focus solely on the enhancement of your portfolio and the achievement of your financial objectives.

Full service

The Macquarie Liberty Account provides all the benefits and features of traditional investment dealer brokerage accounts. You receive the expert financial counsel of your qualified Macquarie Private Wealth Investment Advisor, a full spectrum of investment products and solutions, and access to Macquarie Private Wealth's award-winning research resources.

Competitive asset-based fee

Rather than paying brokerage commissions each and every time your portfolio requires maintenance, The Macquarie Liberty Account lets you pay a single, competitive fee based on the asset balance in your portfolio.

Aligned goals

Managing your investment portfolio through a fee-based relationship aligns the fees you pay more closely with the regular advice and service you receive from your Macquarie Private Wealth Investment Advisor. It establishes a shared goal — the overall enhancement of your portfolio and achievement of your financial objectives. Fee-based investing allows you to focus solely on what is right for you and your portfolio rather than the costs of individual transactions.

Added value

Plus, there are added benefits:

- Envoy — 24/7 Internet access to account information, market data, news and investment research.
- No annual RRSP/RRIF administration charges for Macquarie Liberty Accounts that maintain a minimum balance of \$100,000 and minimum fee of \$1,500 annually.
- Fees used to pay for the management of non-registered investments may be fully tax deductible.

More details?

Contact your Investment Advisor today for more information on The Macquarie Liberty Account and begin to experience the many benefits of fee-based investing. Ask about the world of other opportunities Macquarie Private Wealth presents to build your personal wealth.

The comments contained herein are general in nature and professional advice regarding an individual's particular tax position should be obtained in respect of any person's specific circumstances.

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