



Macquarie Private Wealth
A world of opportunities

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HAZEL BENNETT & KURT PEDERSEN



CANDICE WARD/SPECIAL TO THE CALGARY SUN

making a difference...

One of the strongest international brokerage firms in the world, Macquarie Private Wealth has 12 offices in Canada, including Calgary.

The Macquarie Group is a global provider of banking, financial, advisory, investment and funds management services. It is headquartered in

Sydney, Australia, where it was founded in 1969.

In Canada, the firm employs 190 advisors and manages more than \$11 billion of assets for Canadian and international investors.

It plans for continued success by maintaining its reputation for integrity, trust, honesty, ethics and truthfulness.

The company believes

in opening a world of opportunities for its clients. Macquarie Private Wealth has hosted client events in Calgary and other cities to inform and provide integrated thought leadership.

Macquarie offers a global perspective to enrich the understanding of both advisors and investors.

Investment advisors at Macquarie Private Wealth are redefining what individuals can expect from an investment firm.

In addition to providing people with investment advice, the advisors at Macquarie Private Wealth work hard to help make Calgary a great place to live.

Hazel Bennett has been an investment advisor for more than 30 years and has a deep understanding of how trusted advice can help people meet their financial goals. Boutique service, along with client commitment, is a focus for her and Macquarie as a whole.

"We are a full-service firm and can offer accessibility to all segments of the market," Bennett explains. "For example, everyone over 18 years old should have a tax-free savings account. It makes a lot of sense. It's never too late to start investing and, in the case of RESPs, you are never too young," she says.

Known for bringing her community spirit into the workplace at Macquarie, Bennett helps spearhead charitable events at work and spends many hours volunteering.

For the past 30 years, she has volunteered for the Calgary Zoo.

"I am a senator on the Calgary Zoo board and I help get the story out about our wonderful facility. I have been to the Antarctic and Africa to let people know about the Calgary Zoo and all it does," says Bennett.

She also volunteers for 4-H as a scholarship administrator and chairs the Contest Subcommittee of the Calgary Stampede Royalty committee.

"It is such a great opportunity for young women," Bennett says.

Kurt Pedersen, a chartered accountant by background, is another of Macquarie Private Wealth's Calgary investment advi-

sors. He got into the business 14 years ago.

"I find it very rewarding helping people find good investment ideas," he says. "Our business has been built almost entirely on referrals, which is the best way to grow."

While the news about today's markets can sometimes be gloomy, Pedersen suggests that people can use that to their advantage.

"We're effectively in a zero interest rate environment, but there are many opportunities that people are probably not aware of for generating yield with safety," he says.

As well as helping grow his clients' wealth, Pedersen also believes in the importance of raising money for charities.

Along with his colleagues, Jennifer Maclean and Ed Rha, he has raised close to half a million dollars for charity in the past four years.

His team gathers ideas submitted by clients to find recipients for the funds. This past summer, they organized a Stampede party and raised \$60,000 for the Kidney Foundation. The Macquarie Foundation matched the funds so that \$120,000 could be donated to the worthy cause.

"It's such a win-win situation because everyone has a great time and the charity receives some needed funds," Pedersen says.

His team has also raised donations for the Children's Hospital and Hospice Calgary.

For investment advisors Bennett and Pedersen, being part of the community and making their mark on it is important. Macquarie allows them to do that with its unique structure and management style.

The company recognizes that its people are its most valuable assets.