

Macquarie Private Wealth

A world of opportunities




# A FAST, EASY WAY TO INVEST

MAKING ONLINE DEPOSITS THROUGH MACQUARIE PRIVATE WEALTH

## 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](http://macquarieprivatewealth.ca)

As a client of Macquarie Private Wealth, you now have the ability to make deposits into your Macquarie accounts directly from your bank account via Internet banking.

## How does it work?

You will now be able to select Macquarie Private Wealth Inc. as a payee when accessing your banking services online.

Simply choose to transfer money directly into any of the following Macquarie Private Wealth accounts: Canadian Cash, Margin, Options, RRSP, and Spousal RRSP. Please note that this functionality is not available for accounts held directly with a mutual fund company.

You are also able to transfer money directly into a Macquarie Private Wealth Tax-Free Savings Account (TFSA), a flexible registered account that will let you earn tax-free investment income. Contact your Investment Advisor about the many benefits of setting up a TFSA.

## Which banks offer this service?

The list of institutions that now have Macquarie Private Wealth set up as a payee are Alberta Treasury Branch, Bank of Montreal, Caisse Populaire Desjardins, CIBC, Credit Union Central BC, HSBC, National Bank of Canada, President's Choice Financial, RBC, Scotiabank, TelPay and TD Canada Trust.

## How to set up a payee

Steps may vary depending on each financial institution.

1. Go to the "Bills" section of your online banking site.
2. Click on "Add" or "Add Payee" (will vary based on bank).
3. Search for "Macquarie Private Wealth."
4. Add MPW to your Payee list.
5. Add your MPW account information.
6. You can now initiate an online transfer of funds to your MPW account.

## Other important information you should know

All funds paid into your RRSP account will be deposited as a Contribution (CN), and those paid into your Spousal RRSP account will be deposited as a Spousal Contribution (SCN). If you would like to process a regular contribution into a Spousal Plan, you need to notify your Macquarie Private Wealth Investment Advisor so that he or she can make arrangements to accomplish this. All funds paid into your non-registered account will be deposited as a Cash Receipt (CR).

## Contact us for more information

We hope you will take advantage of this convenient way to add to your investment portfolio whenever new funds become available. Every little bit helps you to reach your financial goals.

Please contact us should you have any questions, or to learn about the world of other opportunities we present to build your personal wealth.

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