

Macquarie Private Wealth

A world of opportunities




# ENHANCED PORTFOLIO MONITORING CAPABILITIES

MACQUARIE PRIVATE WEALTH'S ENVOY ONLINE ACCOUNT ACCESS

## 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)

## Ease and insight

Envoy is an easy-to-use online tool that allows you to review your investment portfolio from the convenience of your computer at home, or wherever you may be traveling. Envoy boasts significant enhancements over other online account viewing platforms. It gives you a better understanding of the composition and performance of your investments, and it facilitates effective communication between you and your Investment Advisor, as it provides both of you with exactly the same portfolio details.

## Capabilities

With Envoy, you can:

- Access investment portfolio information whenever you want, 24/7
- Stay informed with current news and market information
- Gain investment insights through access to Macquarie's award-winning equity research
- Generate investment portfolio reports for printing or later use
- Retrieve historical trade confirmations and account statements
- Customize your usernames, passwords and account nicknames for easier recall
- Add other financial items to build a complete financial snapshot — including bank accounts, investment accounts, retirement plans, insurance policies, real estate properties, credit lines, and mortgages
- Keep your information safe through enhanced Internet security

## Accessing Envoy

- Step 1: Ask your Investment Advisor for a username and password.
- Step 2: Go to [macquarieprivatewealth.ca](http://macquarieprivatewealth.ca) and click on the "Login to Envoy" button on the right-hand side, or go directly to <http://envoy.macquarieprivatewealth.ca>
- Step 3: Log in using your issued username and password.
- Step 4: Change your username and password to something easier to remember.

Should you forget your username or password, contact your Investment Advisor to have them reset instantly.

## Excellence

Envoy is an expression of our commitment to deliver a world of opportunities to build your personal wealth and a key component of our client service platform. We are committed to Envoy's continuous improvement and welcome your feedback on its value and functionality. Please let your Investment Advisor know if there are any ways that Envoy could serve you better.

**Gain a clearer picture of your investment portfolio by setting up your Envoy account access today.**

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