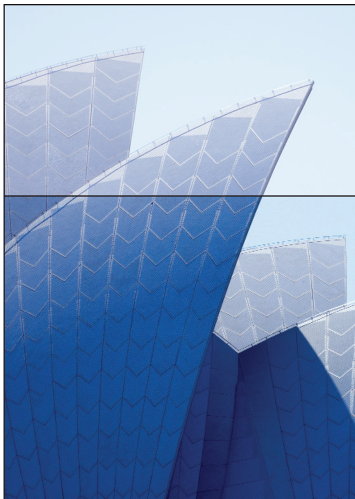

Macquarie Private Wealth

A world of opportunities

MACQUARIE

TRUSTED, INNOVATIVE, CURRENT AND CONNECTED

FRED BRUUN, CIM, FCSI, CFP, ASSOCIATE DIRECTOR AND INVESTMENT ADVISOR

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.

Fred Bruun, CIM, FCSI, CFP
Associate Director
Investment Advisor
T: 416 864 3555
fred.bruun@macquarie.com
www.fredbruun.com

Macquarie Private Wealth Inc.
Brookfield Place
181 Bay Street, Suite 3200
Toronto, ON M5J 2T3

TF: 1 866 775 7704
F: 416 864 9888

macquarieprivatewealth.ca

The focus of my practice is helping private individuals, entrepreneurs and small corporations to achieve their financial objectives through insightful long-term wealth management strategies. My foundation in financial planning and insurance brings my clients diverse investment solutions, and my network of established contacts in the industry grants them access to unique and proven asset managers who employ disciplined techniques.

Putting my clients first

As a Certified Financial Planner (CFP), I ensure that sound financial planning strategies provide a firm foundation for everything I do on behalf of my investors. It is important to make decisions on a broad basis about where you want to go before thinking on a micro level about how you are going to get there.

Representing investors ranging from young businesspeople to retirees, I focus on satisfying my diverse clientele through a comprehensive, conservative, disciplined approach to wealth management and a commitment to providing objective advice. Most of my clients are affluent investors with an entrepreneurial mindset who demand a high degree of customization, so my practice provides a range of options. Following a truly client-focused philosophy, I am happy to deliver what my clients want rather than follow an established formula of what I wish to offer.

Some clients prefer to use my traditional security selection approach to investment management, and rely on me for customized portfolio construction and analytical support. Others opt to invest for long-term, reliable growth through a combination of stocks, funds, and bonds through the unique and exceptional Macquarie Integrated Managed Account (IMA) platform.

Disciplined, conservative financial leadership

I believe strongly in following a disciplined and proven investment process that involves structure, planning, vision, direction, and practical solutions. It is essential to take the necessary steps to protect your assets first, then grow your wealth in a steady and stable manner.

My financial leadership begins with the right financial plan and evolves into a customized portfolio construction process. It encompasses proven, diverse strategies that enhance returns while minimizing risk; maintains clear, consistent communication and regular reporting; and involves timely adjustments whenever necessary to ensure a lifetime of wise investment choices.

Customized financial solutions

The portfolio I create for you will be uniquely customized, based on your specific needs and preferences. I invest the time to understand your financial circumstances, long-term goals, level of risk tolerance, and desired degree of involvement in the investment process.

You can expect a very high level of service from me. My structured communications strategy was designed specifically to exceed your expectations and create a unique and rewarding financial experience through regular quarterly reviews and ongoing daily monitoring.

Unique investment opportunities

A unique point of difference I offer is the ability to tap into some of the finest funds available in the brokerage business through my personal network of contacts. These relationships have enabled me to obtain access to opportunities that would otherwise be reserved for investors of higher net worth categories.

Fred Bruun, CIM, FCSI, CFP

Trusted, innovative, current and connected (continued)

Insurance† solutions

There are some instances in financial planning for families in which insurance plays an important role in protecting your family. Some of these include:

- the untimely death of the major income earner;
- a serious illness or disability that affects your income and savings; and
- when health services are required outside of Canada.

As I am licensed to sell life, and sickness and disability insurance†, I can help you to dovetail the ideal insurance† solutions into your larger financial picture in the most effective way. It is most affordable to make these arrangements as early as possible, when both spouses are in excellent health.

Retirement and estate planning

Some of the most important aspects of my practice include retirement planning to help people prepare for successful and inspiring senior years; estate planning to ensure their last wishes are carried out to deliver the maximum benefit to their beneficiaries and chosen charities with a minimum of taxation; and succession planning to help affluent investors pass their wealth on to the next generation effectively and efficiently.

My background and credentials

I have over twelve years of wealth management experience and have worked at one of Canada's largest bank-owned investment dealers as well as a highly entrepreneurial, niche-oriented boutique investment firm.

In 2008, I joined the predecessor firm to Macquarie Private Wealth. Today I offer my clients the superior structure and support of one of the world's largest and most diversified financial companies along with the independent, entrepreneurial spirit and personal, client-focused service of an investment boutique.

Macquarie Private Wealth is an investment firm that truly embodies the best qualities of both the large and small firms for which I have worked.

I hold a B.A. in Economics and Finance from the University of King's College in Halifax and have completed various industry designations and courses including Options and Futures; Life Insurance†; Accident and Sickness Insurance; and Disability Insurance†. I am also a Certified Financial Planner (CFP), the only internationally recognized financial planning designation.

I enjoy spending time with my wife and two daughters and being involved with charitable endeavours, most notably my membership on the Board of Directors for the Callahan Foundation, which provides grants for deserving medical students. I also sit on the Upper Canada College Association Council, and have held various volunteer roles at UCC for 15 years.

Proud to be part of Macquarie Private Wealth

Macquarie Private Wealth is a strong global presence that is redefining what Canadians can expect from a personal investment firm. We provide our investors with tailored financial solutions, award-winning research, recognized financial strength, and a global perspective — in short, a world of opportunities to build your personal wealth.

We are part of the Macquarie Group, a global provider of banking, financial, advisory, investment and funds management services. Since 1992, the firm has recorded successive years of profits and growth.

Contact me for innovative solutions

If you are seeking customized investment services from a well-connected and innovative advisor backed by one of the world's largest and most diversified financial companies, I welcome your call.

Visit my website at www.fredbruun.com

†Insurance products and services are offered by life insurance licensed Advisors through Macquarie Insurance Services Ltd., a wholly owned subsidiary of Macquarie Private Wealth Inc.