Macquarie Private Wealth

A world of opportunities

MACQUARIE

PORTFOLIOS AND RELATIONSHIPS BUILT TO LAST

STEVEN CONVILLE, MBA, CFP, FCSI, VICE PRESIDENT, PORTFOLIO MANAGER

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.

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Helping you live the life you want now — and when you want to retire

Over the past 13 years, I have been helping affluent Canadians preserve and grow their capital. I understand that what you make today must meet your needs now and well into the future. That's where I come in as your advisor.

I partner with you to create and implement a conservative financial plan that will enable you to enjoy your hard-earned money for years to come — and leave a legacy for those you care about.

My commitment of excellence to all clients

All of my clients can rightfully expect me to work tirelessly on their behalf to protect their financial future. You've earned the right to rest easy. I'll help you do just that with a partnership based on discretion, trust and education.

Discretion is key.

I work solely in the best interests of each of my clients. Given my clients' high net worth, personal and professional situations, privacy and discretion are the utmost concerns of my practice. Your wealth, needs and goals are guarded safely.

Trust is invaluable.

I am committed to the long-term well-being of my clients. Through countless changes in life situations and market cycles, my clients count on me to provide them with solutions. As a testament to my long-lasting client relationships and strong performance of my portfolio strategies, my clients frequently refer me to their families and close friends.

Education is empowerment.

It is paramount that you understand your investments and know how I am managing them. I have a well-established track record of educating clients and explaining complex financial concepts to them

A conservative approach to growing your wealth

Over the course of my career, I have learned that the best way to make money is not to lose it. Capital preservation is the key to wealth management. Accordingly, I employ a disciplined, structured approach to managing money that includes asset protection strategies like income vehicles (GICs, bonds, preferred shares). In the world of investing, risks generally do not pay off. Instead of trying to shoot the lights out, I'll work to provide you with a steady rate of return year in and year out. I have found that this approach is more successful and much less stressful for my clients.

Let me help you achieve balance — in life and investing.

You have enough on your mind. Let me ease the burdens. I can help you find balance — financial and otherwise. Together, we will create a financial plan that secures an enjoyable lifestyle for you and those who depend on you. Together, we'll build a partnership and portfolio that will last a lifetime and leave a legacy.

Visit my website at www.macquarieprivatewealth.ca/conville