



Macquarie Private Wealth

A world of opportunities



A PROFESSIONAL DEDICATED TO EXCELLENCE

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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For over 13 years, I have skillfully helped individuals preserve and grow their capital. My experience in the financial industry includes managing portfolios as well as offices. I built and ran several brokerage branches for two major Canadian financial institutions. As well, I have achieved the designation of Portfolio Manager at Macquarie Private Wealth, a distinguishing credential I possess that gives me a clear advantage over many of my peers. In this capacity, I am qualified to advise on a discretionary basis, and have developed detailed model portfolios to satisfy a range of client preferences using a disciplined investment approach.

I attained my MBA in Finance from Laurier University; a Post-Graduate Diploma in Investment Management from Concordia University; a Bachelor of Arts Degree (Hons.) from York University; my Certified Financial Planner (CFP) designation; my Fellow of the Canadian Securities Institute (FCSI) designation; and my Canadian Investment Manager designation (CIM). I believe that education is empowerment and continually seek out opportunities to further my investment knowledge.

I have a strong desire to give back to the community. Accordingly, I'm quite active on the sponsorship and management side of a number of celebrity charity golf events including those hosted by Sam Mitchell (NBA personality), Kevin Weekes (former NHL player and TV personality), and and Marshawn Lynch & Josh Johnson (NFL Stars, "Family First" football camp).

My interest in investing carries over into other areas of my volunteer work. As a member of the Urban Financial Services Coalition (UFSC), I provide financial education, mentoring, advice and access to underprivileged children. I am also involved in the Investment Advisory Committee of the Ministry of the Attorney General for the Province of Ontario for the Office of the Guardian of the Public Trustee. The government is entrusted with several billion dollars — funds that have been bequeathed to, and are used to, support orphans and elderly individuals without families. Our committee is the voting panel that regulates the Investment Advisors who manage these funds on behalf of the province.

For more information on the services I offer, please contact me directly.

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