Macquarie Private Wealth

A world of opportunities

MACQUARIE

OUR PROVEN PROCESS

PHILIP FRANCIS, CIM, FCSI, Ch.P. *Strategic Wealth*®, 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.

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The best client is an informed client. We ensure that our clients understand their investments as well as the market and economic factors that influence them. When clients are informed, engaged and actively involved, they develop trust and understanding in what we are doing and are less likely to abandon sound strategies at the worst moment.

We remain accessible. Our doors are always open, but we don't wait for you to come calling. At least once per quarter, and more frequently as required, we will schedule a call to touch base. This is in addition to sitting down together for a face-to-face meeting to review your objectives each year. At any time, if you have questions or concerns, Philip will make himself available.

With a collaborative approach honouring the true spirit of partnership, we follow a four-step approach to wealth management:

1. **Profiling** — Through in-depth discussion and analysis with you, we create a detailed profile of your financial situation, time horizon, risk tolerance level, goals, and expectations.
2. **Proposal** — In this phase, we prepare an individualized proposal, which acts as a roadmap for your financial journey. The proposal incorporates Philip's asset allocation strategy recommendation and outlines his service and communication commitments.
3. **Implementation** — At this point, Philip selects investments to implement the asset allocation recommendation outlined in the proposal. As he constructs the portfolio during this phase, he ensures that each holding is aligned with your risk and return objectives.
4. **Review** — We regularly review your investment portfolio and contact you as required to discuss any changes. In addition, Philip writes a newsletter quarterly for his investment clients, which communicates his personal views on the investment outlook and offers important and timely insights into the factors likely to affect your portfolio in the months ahead.

Contact us

Philip Francis offers the ultimate in experienced portfolio construction and management. As a dedicated, highly trained wealth strategist, Philip offers comprehensive financial planning leadership for your family's long-term success. If you desire multidimensional expertise delivered with the utmost in integrity, reliability and client focus, we welcome your call.

Visit our website at www.philipfrancis.ca