



Macquarie Private Wealth

A world of opportunities



# HOLISTIC LIFE AND FINANCIAL PLANNING LEADERSHIP

CORINA MURDOFF, 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.

## Corina Murdoff

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As an investment professional with over 20 years of experience and a passion for helping people, I focus on the human side of financial planning. My unique approach goes beyond wealth management to encompass life coaching. Through a process of structured inquiry, I discover each investor's most important goals. Then, using my unique mix of advisory and personal skills, I inspire each individual to pursue those goals, identify and resolve obstacles, build and follow a strategic financial plan, and provide ongoing guidance as they move through life, reaching their objectives.

## Wealth management in context of life planning

I welcome the opportunity to be a positive influence on my clients' financial futures, and believe that my clients deserve to be successful in achieving their financial goals and personal dreams. With the utmost in empathy, sincerity and dedication, I advise my clients wisely with sensitivity to the unique needs and objectives of each individual.

My investing philosophy is based on two strong beliefs. One is the importance of maintaining a positive outlook on business and the markets, remaining confident even in the most challenging environments. The other is the absolute value of creating a financial plan that is driven by your life plan, rather than living your life driven by the creation or limitations of your wealth.

## Comprehensive wealth management services

Many investors seek a closer relationship with an advisor after dealing with big banks that provide no one to monitor or interpret the performance of their assets. I offer a highly personal, attentive approach and a comprehensive suite of individualized services.

I focus on providing long-term wealth management by building portfolios based primarily upon fixed income and energy trusts, to generate a steady flow of cash for my investors along their path to their life goals, including a prosperous retirement.

Whatever your financial needs, I will take good care of you with customized solutions designed uniquely for your own circumstances and preferences. My clients appreciate the fact that I call them more often than they need to call me, and that I carefully monitor the progress of their portfolios on a daily basis. You work hard for your money, and I will make it work hard for you.

If you own a business, I can also assist with your corporate financial needs, providing experienced counsel on a range of vehicles including equities, RRSPs, banker's acceptance instruments, income trusts, and flow-through shares.

## Retirement planning

I see retirement as an exciting new stage of life. A fresh start. Today, retirement is less about retiring from work and more about retiring to something you love. A successful retirement happens when you find things you would love to do and plan ahead so that you can go out and do them.

To help you prepare for a fabulous future, I don't just look at your money: I look at everything that a meaningful life could embrace: family, learning, work, adventure, and a legacy. It's a fact that people who feel financially and emotionally prepared tend to be healthier and more optimistic than those who have not made adequate plans. I can provide the guidance you need to retire in comfort and peace of mind.



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Holistic life and financial  
planning leadership (continued)

### Public venture capital

If your dreams involve an entrepreneurial venture, I can provide you with access to The Private Venture Capital Group (PVC) at Macquarie Private Wealth. These professionals source, vet, and structure early stage private and public financings for distribution to provide us with quality investments, often yielding favourable rates of return. They also have the expertise to help you take your new ventures public.

### Reaching out to remote communities

My clientele is extremely diverse, and stretches throughout every province from B.C. to Ontario. While many of my clients are located in Calgary, most live in smaller towns that harbour a great deal of wealth, yet often experience a shortage of good investment management services. Many affluent investors in these remote communities own small businesses and appreciate receiving my wealth management services for both their personal and corporate finances.

### My background and credentials

I have enjoyed working in the financial services industry since 1980. My career began at CIBC where I worked for ten years before moving to Burns Fry in 1990, which became Nesbitt Burns. From there I joined the predecessor firm of Macquarie Private Wealth in 1997, where I had greater flexibility to provide unbiased advice and more sophisticated technology with which to offer my clients an elevated wealth management experience.

Extremely dedicated to my career and passionate about helping my clients to invest wisely, I regularly see a business coach who is helping me to develop my skills. Pursuing my vision to become the very best investment professional possible, I am currently studying to receive my Registered Life Planner® designation from The Kinder Institute, a life and financial planning organization founded by George Kinder, CFP, the father of the life planning movement.

I enjoy spending my spare time with my family and pursuing the art of fine cuisine. I studied Business Administration at the University of Regina, volunteered at the Cookbook Company Cooking School in Calgary, and look forward to helping the less fortunate in my community.

### Planning to achieve your life's purpose

No matter where you are located, or where you are headed in life, I will extend myself to bring you the finest and most personalized wealth and life management services you have ever experienced. If you seek an experienced and inspiring professional to help you achieve your personal and financial goals, I look forward to your call.

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