

Macquarie, a “new global presence”

Ron Zwicker and Vicki Cook work together to help their clients achieve financial stability and wealth. They are part of **Macquarie Private Wealth**, a strong new global presence that provides investors with tailored financial solutions and a global perspective.

Macquarie Private Wealth is part of the **Macquarie Banking and Financial Services Group**, the primary relationship manager for Macquarie’s retail client base, which provides services to more than 850,000 clients and has over \$108 Billion of clients’ assets under advice, administration or management.

Mr. Zwicker says, “We provide comprehensive financial planning. If we develop a successful working relationship, we can help you to achieve your goals. You can trust that we will consistently and responsibly perform all requested services and that we will be available when you need us.”

He points out that he and Ms. Cook have a list of guidelines stating they will:

- Treat you with respect, honesty and dignity
- Act as your advisors, putting your interests first
- Strive to acquire a complete and accurate understanding of your goals, your toler-



Ron Zwicker, Vicki Cook
Macquarie Private Wealth

ance for investment risk and your timeframe

- Explain the implications of the strategies we propose
- Update you by email, mail and phone
- Meet with you regularly to review your Investment Policy Statement (IPS)

Ms. Cook says, “Effective communication and mutual respect are essential to a successful partnership, so we expect

and will provide trust, complete disclosure, respect, sincerity, honesty and commitment.”

She says that their recommendations are always based on the client’s best interest. “As our client, you need to know that all investment, tax, estate, and insurance advice will be based on the information you provide to us. We expect you to participate enthusiastically in the wealth management pro-

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She and Mr. Zwicker believe that working as a team with their clients is essential to effective wealth management. The financial business is about people, Zwicker says, and about their financial well being.

Because everyone’s circumstances are different, Mr. Zwicker and Ms. Cook initially suggest a short conversation to determine if their services are the right fit. If the answer is yes, they then schedule a meeting to review and establish the client’s personal goals and objectives. The next step is to create an investment plan with recommendations that are designed specifically for each client.

Proof that Zwicker and Cook’s approach works lies in the dozens and dozens of testimonials they receive each year. A typical letter is this one from

Chris Turek and Teresa McDonald:

“Ron Zwicker and Vicki Cook have been a great asset to my wife and I when it comes to managing our investment portfolio. They have always steered us in the right direction with respect to decision-making and steered us away from risk they felt we could not support.”

Mr. Zwicker says, “With the client focus of an independent investment boutique along with the backing and benefits of one of the world’s largest and most diverse financial companies, Macquarie Private Wealth has an enviable position and strength in the industry.”



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R.M. (Russ) Burke
Branch Manager
Nanaimo
Ph 250.390.6400



Jason Zaichkowsky
Branch Manager
Courtenay
Ph 250.331.6037



Robert Granger
Branch Manager
Victoria
Ph 250.995.3554

