Welcome to Mackenzie Private Wealth

Elevated solutions with elevated support

MACKENZIE
Private Wealth

Canadians are invested.

Invested in their families.
Invested in their careers.
Their relationships.
Their environment.

You've worked hard to create your wealth. With more assets often comes more complexity – that's where Mackenzie Private Wealth helps take your portfolio to the next level.

Mackenzie Private Wealth works with your advisor to help support you with a complete suite of wealth management services, spanning investments, tax and estate planning, philanthropy and beyond.

Your advisor has access to a dedicated portfolio manager, who is a member of the Mackenzie Multi-Asset Strategies Team, to assist in developing a modern portfolio to suit your unique financial plan.

As a specialized team of professionals, we provide expert guidance in developing integrated wealth management solutions for households with at least $500,000 in investable assets.

In the following pages, we'll explore the high value services that you'll receive.

Elevated portfolio expertise

Flexible investments to meet your goals

Your financial goals are unique. Mackenzie Private Wealth provides flexible investments to meet them.

We offer carefully constructed model portfolios through the Portfolio Architecture Service (PAS), built by our highly skilled Multi-Asset Strategies Team. With the PAS, you and your advisor first establish your investment objectives, attitude towards risk and time horizon. Your advisor works with us to craft a portfolio solution for you, and monitor and rebalance it as necessary, to ensure your financial strategy stays on track.

Alternatively, you can work with your advisor to develop a portfolio that is specifically tailored to meet your unique needs and objectives through our Open Architecture Service (OAS). In this case, you and your advisor work together to construct your portfolio. We then implement those portfolio decisions and provide administrative services, including monitoring, based on parameters established by you and your advisor, with quarterly consolidated reporting and performance measurement. Your advisor will rebalance your portfolio as needed.

Mackenzie Private Wealth supports both bundled and unbundled compensation models to suit your client-advisor relationship.

Institutional grade portfolios

When you invest with Mackenzie Private Wealth, you have access to a range of model portfolios designed to suit different investment goals.

These models are designed by the Mackenzie Multi-Asset Team, using rigorous research and strategies similar to those employed by institutional investors, such as pension plans or endowment funds.

A successful institutional investor has a clear definition of what they are trying to achieve, and a means to assess if those objectives are being met. Mackenzie Private Wealth uses a similar approach to benefit investors.

Our investment management expertise covers almost every asset class, geographic region and investment style. With 17 investment boutiques globally, we provide a diverse array of offerings – from core fixed income and equities to new and innovative solutions in ETFs, alternatives and sustainable investing.

Risk is managed through periodic monitoring to ensure your asset mix continues to reflect your objectives and your risk tolerance.

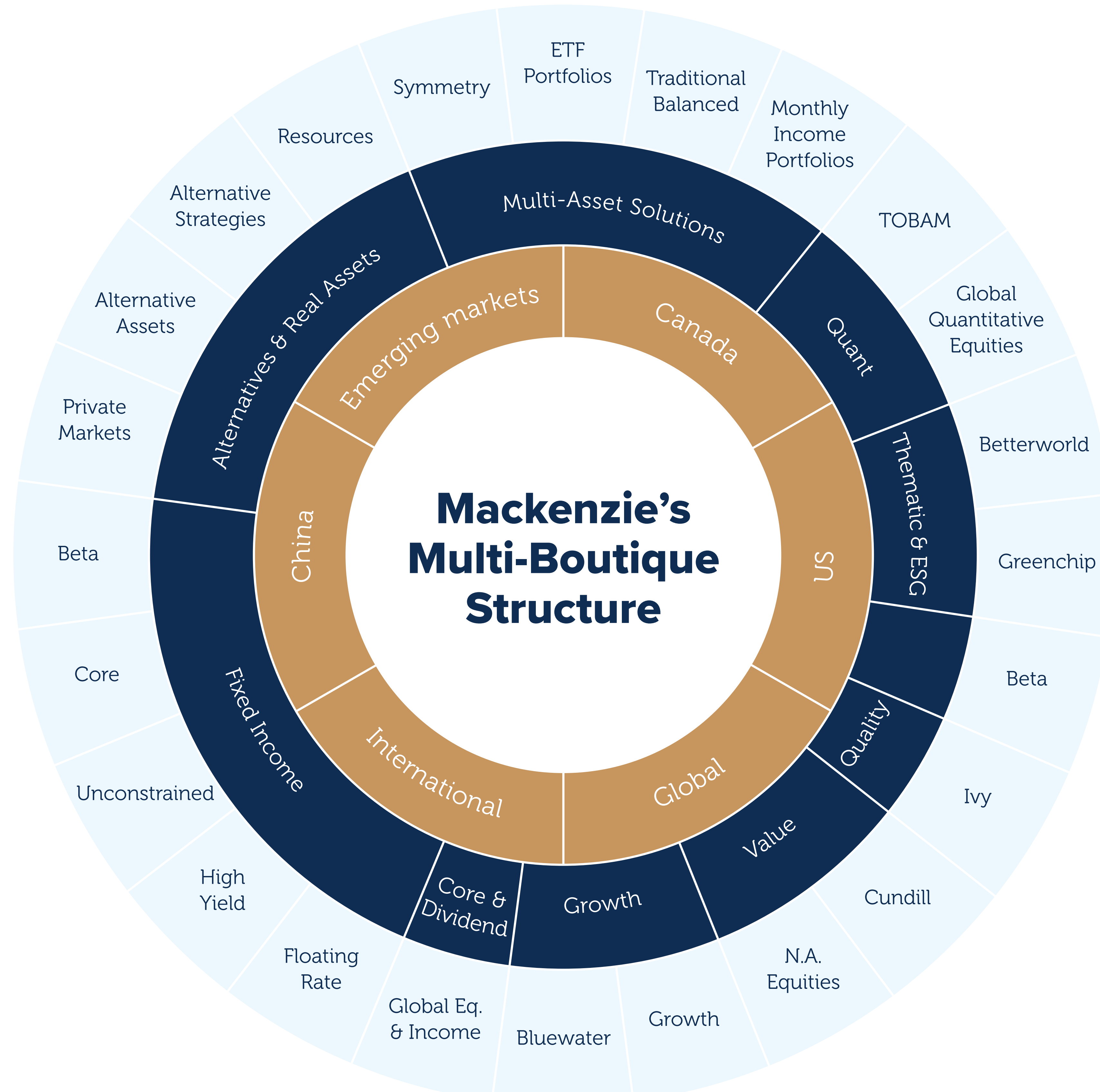
Global expertise & partnership

Our multi-boutique structure delivers key capabilities

Across geographies:

- Canada
- US
- Global
- International
- China
- Emerging markets

Each portfolio is built to achieve strong returns within specific risk parameters.



Our tiered management fee structure means that the more you invest, the lower your fee.

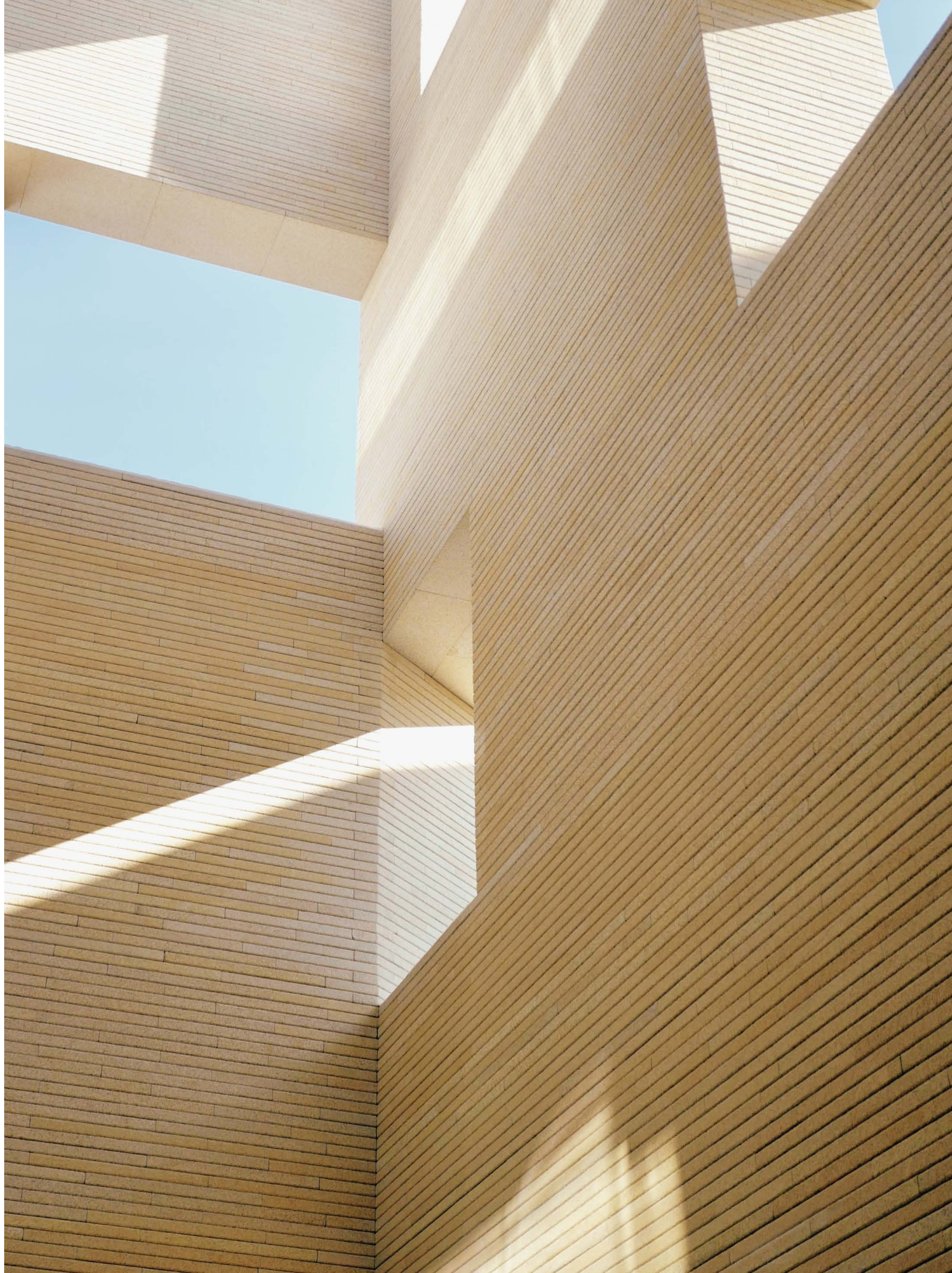
Preferred fee structure

The Mackenzie Private Wealth program is accessible to households with a minimum of $500,000 in investable assets. These assets may be held across multiple accounts, in the names of different household members. Aggregating assets in this way make the program highly accessible.

With greater assets come economies of scale. Our tiered management fee structure means that the more you invest, the lower your fee.

Every household in the program benefits from Series O pricing, which is otherwise reserved for large institutional investors. This structure is highly adaptable, making it suitable for different client-advisor relationships:

- Nominee accounts
- Bundled compensation
- Unbundled compensation



Elevated support

You'll benefit from a dedicated Mackenzie Private Wealth Account Manager, who will co-ordinate with your advisor to provide a holistic approach to your financial affairs. Through a single point of contact, your advisor can leverage our expertise.

Your privacy is important

We treat our clients' personal information with the highest standard of care and take all steps necessary to protect your confidential information.

You can trust that any personal information provided to Mackenzie Investments will be handled in accordance with Mackenzie's Privacy Protection Notice, which is available at mackenzieinvestments.com/en/legal-and-privacy/privacy-protection-notice.

Elevated HNW expertise

Mackenzie's expertise goes far beyond portfolio construction. Mackenzie Private Wealth includes the benefits of highly experienced professionals in:

01

Tax and estate planning

02

Philanthropic planning

03

State-of-the-art communication

04

Household consolidation

01
Tax and estate planning

As a Mackenzie Private Wealth client, you have the option to request a Tax and Estate Summary Report. This comprehensive report contains information on:

- the tax implications of your investment activities,
- potential strategies to reduce your tax bill,
- preparing a will,
- creating a power of attorney,
- a general discussion of your insurance needs, and much more.

Our experienced team of tax and estate specialists also provide your advisor with online thought leadership and solutions to difficult tax challenges.

02
Philanthropic planning

Mackenzie makes long-term philanthropy easy and cost-effective, through the Mackenzie Charitable Giving Program. This donor advised fund allows you to make tax-efficient contributions and direct them to the charity of your choice.

The program offers many of the advantages of a private foundation, without the upfront costs and administrative responsibilities.

03

Household consolidation for greater clarity

Working with your advisor, you have the choice of developing investment portfolios for each individual in your household, or on a consolidated basis.

Consolidation allows asset allocation, tax planning, monitoring and reporting to be performed at the household level. Most household accounts are considered together, with a coordinated strategy across family accounts.

Once your overall asset mix is determined, Mackenzie Private Wealth will make suggestions to your advisor as to how the asset mix could best be allocated across individual family accounts to help minimize taxes and build family wealth.

Your consolidated portfolio is monitored at the household level to manage risk across eligible family accounts. On a quarterly basis, households receive a single statement which presents a family's entire Mackenzie Private Wealth portfolio at a glance.

04

State-of-the-art communication

We keep you well informed every step of the way with clear, comprehensive reporting that includes market commentaries, a record of transactions, portfolio holdings and performance. These reports are available for either individual accounts or consolidated households.

Comprehensive tax reporting is delivered at the end of each year to clients with non-registered accounts. The year-end Mackenzie Private Wealth tax package contains household tax information conveniently in a single envelope.

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If you have any questions, please contact your financial advisor,
Mackenzie Sales Team, or: Mackenzie Private Wealth
Toronto: 416-922-5322

mackenzieinvestments.com/private-wealth