MACKENZIE
Private Wealth

Elevated solutions and support

Since 1999, Mackenzie Private Wealth has provided high-net-worth clients with the wealth management services they require.

When you work with Mackenzie Private Wealth, you and your clients have access to elevated portfolio construction and wealth management expertise, with truly exceptional service and support.

Mackenzie Private Wealth provides access to:

Portfolio customization

- Access to bespoke portfolio investment solutions.
- Elevated portfolio construction engineered to meet your clients' unique goals.
- Dynamic household portfolio monitoring and rebalancing.

Elevated support

- Comprehensive annual review to align your client's investment goals.
- Personal account manager to assist with account concerns and onboarding process.
- Consolidated household reporting.

Preferred fee structure

- A tiered fee structure reserved for institutional and high-net-worth clients.
- Available to households with a minimum of $500,000 in investable assets.
- Flexible compensation models to complement your business.

Tax & Estate Planning

- Access to comprehensive Tax and Estate Planning summary report.
- Customized tax planning strategies including tax implications of investment activities and potential tax reduction strategies.
- Personal Tax & Estate one-on-one conversation to develop custom plan.

If you have any questions about Mackenzie Private Wealth, please contact your Mackenzie sales team or the Mackenzie Private Wealth team directly at MPW@MackenzieInvestments.com.

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