

# Your World. Our Guidance.

An Introduction to our Private Wealth offer

“

Our priority is to serve your financial goals and we recognise that these goals are often broad, diverse and global. By understanding these goals, we are able to tailor our service and recommendations to help you go wherever you would like your investments to take you.

”

Stephen Jones, Executive Director  
Canaccord Genuity

## About Us

We are a Global Investment Bank that provides tailored outcomes for our clients via our expertise in capital market transactions and wealth management.

We have operations in Canada, US, UK, Europe, Middle East and Asia Pacific and protect over C\$59\* billion of our client's assets.

## Our Approach

Based on detailed conversations with you, we focus on your priorities to build an asset allocation that best meets your financial objectives; manages risk; minimises CGT; and lead you confidently towards the future you desire – all the while maintaining an open and transparent communication approach.

## Our Offerings

### Private Client Broking

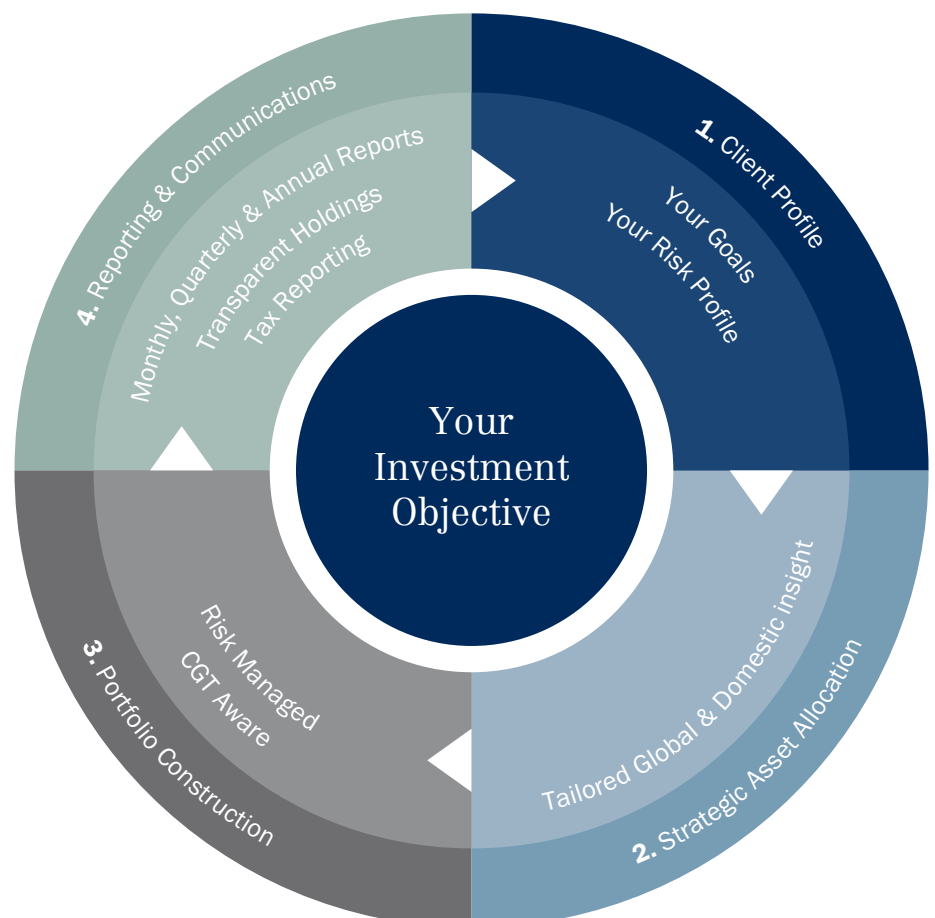
Transact and own domestic and international equities in one easy to use platform. Access our award winning<sup>^</sup> in house equity research and deal flow from our market leading capital markets teams globally.

### Portfolio Management –

#### Separately Managed Accounts (SMA)

An SMA represents the most efficient means of meeting your investment objective whilst allowing you to focus on living your life. We have 2 primary Investment solutions focused on providing a growth or income outcome:

- Australian Equities
- Global Multi Asset Class



To learn more about our Private Wealth offer please contact:

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\* As per Canaccord Genuity Group Inc third Quarter fiscal 2018 Results (February 6, 2018).

<sup>^</sup> Thomson Reuters Analyst Awards 2016, 17.

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