

May 1, 2017

OUR FEATURED STORY

I strongly recommend that you introduce your high-net-worth clients to Manulife Private Wealth.

Graham Carter

President & CEO
CAP Advisors Inc.

I first met with Manulife Private Wealth when they opened in late 2012. The focus of my business is underwriting large life insurance policies for tax and estate planning purposes, but in the past year more and more of my clients have asked for help with their investment management programs.

I have contacts with many of the investment counsellor firms in Toronto, but have recently made Manulife Private Wealth my first referral source for asset management services.

The combination of a global investment network, very strong platforms in Canada and the United States and some very talented people are the factors that give me the confidence to recommend Manulife Private Wealth to my clients.

My first referrals were two young adults who inherited a large estate from a client and good friend who passed away several years ago. I wanted to make sure the children received solid advice on investing their newfound wealth, but more importantly would be in good hands long after I had retired. The Manulife Private Wealth portfolio manager has done an excellent job of both educating my clients and keeping me in the loop on the investment management strategy.

My second referral was a sophisticated and very successful businesswoman. A recent liquidity event put her in the position of needing at least three asset management firms and our first meeting was with Manulife Private Wealth. My client is extremely pleased with the investment management platform and is also looking forward to working with the tax and financial planning experts that are part of the Manulife Private Wealth relationship.

The greatest advantage for Manulife Private Wealth is that they are part of Manulife Financial, a company that is 130 years old, manages close to \$1 trillion in investment assets and operates in 22 countries around the world. I strongly recommend that you introduce your high-net-worth clients to Manulife Private Wealth.

Call us at 1-855-283-1853 and learn more about the Manulife Private Wealth platform today.



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