Manulife
Wealth

M is for *more*

As a Manulife Wealth advisor, you get more:

- More autonomy and independence
- More support
- More fulfillment
- More opportunity to run your business your way

From the moment you join the Manulife Wealth team, you'll notice the difference.

For more information, visit manulifewealth.ca/makeachange.

Manulife
Wealth

Discover the difference

From the moment you join the Manulife Wealth team, you'll notice the difference.

Freedom

At Manulife Wealth, you run your business *your* way. When you're free to provide advice that's liberated from unwanted influences or corporate distractions, the result is a superior alignment between your clients and the structure of your practice.

Independence

As a Manulife Wealth advisor, you work for your clients and for yourself. You own and control your book of business. We also believe it's your right to be the exclusive beneficiary of the business equity you create. When the time comes to monetize your book at the end of your career, or by circumstances, you have the freedom to do so on your own terms.

Professional support for professional advice

We're committed to providing you with the professional support you need to help you deliver qualified, impartial, objective advice. From financial planning and business development tools to progressive digital enhancements that improve your productivity and enhance your clients' experience—you'll find everything you need to support your success now and in the future.

Collaboration, not competition

We respect you and the practice you've worked hard to build. We work with you to advance your goals and to overcome challenges. At Manulife Wealth, we recognize the value of your advice to clients. At our dealer, you're the one who chooses which, and the extent to which, our programs and services may be suitable to recommend to your clients.

Manulife Wealth checks off key boxes

Globally recognized brand—Manulife Wealth is a wholly owned subsidiary of Manulife Financial—One in five Canadians own at least one Manulife life, health or wealth management product.

Corporate strength and longevity—Manulife has been helping Canadians reach their goals for 133 years. Manulife Wealth has more than 1,200 independent advisors across the country.

Comprehensive selection of products and dealer programs—Our expansive shelf includes stocks, bonds, new issues, options, mutual funds, exchange-traded funds, transactional and fee-based accounts, separately managed accounts, advisor-managed discretionary accounts, and more, making it easy for you to fulfill the needs of a wide range of wealth management clients.

Access to capital markets capabilities—Manulife Wealth's investment banking and equity capital markets capabilities will provide you with the research, support, and expertise to help give you that competitive edge when you need it.

Full service open-architecture platform—Our open-architecture platform provides you with the flexibility and support to grow your practice your way. At the same time, we're a full-service platform that enables you to compete in the most significant facets of the wealth management space.

Dedicated transition team and operational support—Whether you're mid-career and moving a substantial book or in late career and planning your exit strategy, we have the onboarding and succession planning resources you need to plan for either of these transitions in your life.

Joining us is easier than you think

We understand that leaving your current firm can seem daunting. With our support, you can focus on your clients, confident in the knowledge that we're with you every step of the way. Our dedicated transition team has years of experience and significant bench strength. Our team members are professional, intuitive, conscientious, and caring, and you'll have their support for up to a year after coming on board. Whether you're mid-career and moving a substantial book or in late career and planning your exit strategy, we have the resources you need to transition to the next exciting stage of your life.

“The transition from my previous dealer was handled very efficiently by the advisor transition team. Also, Manulife Wealth's executive management treated me with great respect regarding a personal crisis during my transition period. My experience during and since my move has definitely exceeded my expectations. I'm very pleased with my decision to join Manulife Wealth.”

Bob Seel, Saskatoon, Saskatchewan

“With Manulife, I've found a partner with a depth of support and comprehensive technology services beyond my expectations, and their reasonable approach to business, compliance, and risk management demonstrates their understanding of the needs of the independent advisor.”

Marc Hamel, Burlington, Ontario

“The strength and brand recognition of Manulife was an important part of the decision to leave my position with a bank-owned firm. The support from both our head office and regional team allowed for a smooth transition for my clients. Manulife Wealth is a full-service firm that brings back the entrepreneurial spirit.”

David Whittemore, New Glasgow, Nova Scotia

Get more from your career, give more to your clients

Talk to us today and find out what your life could be like at Manulife Wealth. Your call will be held in the strictest confidence.

Western Canada

Deb Shorrock, Managing Director
Tel: 204 955-3023
Email: Deb_Shorrock@manulife.ca

Ontario | Atlantic

Mary Helen Morra, Managing Director
Tel: 416 427-3455
Email: MaryHelen_Morra@manulife.ca

Québec

Franck Chevrier, Managing Director
Tel: 514 972-4219
Email: Frank_Chevrier@manulife.ca

MWI1239591E 01/24 AODA