



NEWS RELEASE

FOR IMMEDIATE RELEASE
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MANDEVILLE PRIVATE CLIENT INC. FURTHER ENHANCES CLIENT EXPERIENCE WITH INNOVATIVE TECHNOLOGY

BURLINGTON, ONTARIO – October 23, 2017. Mandeville Private Client Inc. (“Mandeville”) is pleased to announce the successful implementation of a new digital client onboarding solution for its advisors. Working with Fidelity Clearing Canada ULC (“Fidelity”), Mandeville implemented Fidelity’s electronic client account platform (“eCap”) with integrated e-signature and approval workflow to improve the quality and timeliness of the onboarding process for advisors and investors.

eCap provides Mandeville Advisors with the ability to complete new account applications online and have their clients electronically sign account forms. Moreover, eCap provides Mandeville Advisors the ability to process individual accounts and households, as well as automate the transition of an Advisor’s entire practice. This innovative digital solution reduces the friction and complexity of what has historically been a frustrating process for advisors and investors.

Mandeville’s new digital signature solution enables Mandeville Advisors to create a fully digital solution for their clients, allowing them to view and sign documents from their computer, laptop or other mobile devices. Documents are imaged and automated workflow manages the approval and account opening process. Simplifying and automating the process creates an enhanced client experience and ensures transfers are initiated quickly once accounts are approved.

"Fidelity Clearing Canada's delivery of innovative solutions is one important way we help our brokers and portfolio managers grow their businesses," said Scott MacKenzie, CEO of Fidelity Clearing Canada ULC. "We are privileged to have engaged clients like Mandeville leverage our platform capabilities to better service their advisors and investors."

“This technological capability is part of the client/advisor experience road map that Mandeville is pursuing. We view technology as an enabler through which Advisors are efficient, freeing them up to focus on building deeper meaningful relationships with their clients,” said Frank Laferriere, Senior Vice President and Chief Operating Officer of Mandeville. “By using eCap, our digital signature solution, clients will have a better overall experience in their journey with their Mandeville Advisor.”

About Mandeville Holdings

Mandeville Holdings Inc., founded by Michael Lee-Chin, is the parent company of the Mandeville group of companies, which includes Mandeville Private Client Inc., Mandeville Insurance Services Inc. and Portland Investment Counsel Inc. Clients of the Mandeville group of companies have ACCESS to the benefits of our family office resources (via Portland Holdings Limited's conglomeration), which means a unique opportunity to invest in quality offerings alongside some of the world's most successful institutions and affluent investors. "The Wealthy Invest Differently." - Mandeville understands this and is committed to democratizing opportunities for wealth creation typically reserved for the affluent and institutional investor.

About Fidelity Clearing Canada ULC

Based in Toronto, Fidelity Clearing Canada provides execution, clearing, custody and back-office support services to Canadian-based brokerage firms and the Canadian brokerage arms of U.S.-based firms.

Fidelity Clearing Canada leverages services and expertise from National Financial Services LLC, Fidelity Investments' U.S. clearing broker-dealer, which has over 3,100 clearing and custody firm clients and is the largest brokerage platform in the U.S. with \$5.1 trillion in assets under administration (as of December 31, 2016). For more information about Fidelity Clearing Canada, please visit <https://clearingcanada.fidelity.com>.

For further information contact:

Mandeville Private Client Inc.

Diana Oddi, Director, Communications and Marketing
T: (905) 331-4255
doddi@mandevillepc.com

Fidelity Clearing Canada ULC

Chris Pepper, Vice-President, Corporate Affairs
Fidelity Investments Canada ULC
T: (416) 307-5388
E: chris.pepper@fidelity.ca