Canaccord Genuity Wealth Management

CANACCORD GENUITY WEALTH MANAGEMENT
Investment Counselling Program

INSTITUTIONAL MONEY MANAGEMENT FOR INDIVIDUAL INVESTORS

With today's more complex and globally interconnected markets, many investors put their trust in professional portfolio management to build and protect wealth.

The Investment Counselling Program (ICP) provides discretionary money management from renowned portfolio managers with diverse styles and investment mandates.

Your Canaccord Genuity Wealth Management Investment Advisor will consult closely with you to customize the ICP to your particular financial goals and risk tolerance. Regular meetings with your Investment Advisor will help ensure that you are progressing towards the coordinates that define your life goals.

FEATURES & BENEFITS

Professional asset management

- Access to a proven institutional investment management approach
- Access to globally renowned portfolio managers
- Comprehensive due diligence of all the managers and mandates in the program
- A consultative process led by your Investment Advisor that customizes this program to your financial needs and goals

Tax advantages

- Direct ownership of securities eliminates hidden or embedded capital gains
- Securities are portable
- Greater transparency and flexibility than investing in mutual funds
- Potential for tax deduction on professional fees paid

Robust performance reporting

- Detailed monthly statements
- Quarterly consolidated view of your portfolio
- Year-end accounting summary

Fee transparency

- Set asset-based fee that aligns your portfolio's performance with your Investment Advisor's compensation.

Expertise all around you

- Access to CGWM's comprehensive wealth management services
- Coordinated thinking across all aspects of your financial life
- Plans and solutions to help achieve your goals in areas including financial and retirement planning, tax planning, wealth protection, wealth transfer and legacy planning*

* Provided by Canaccord Genuity Wealth & Estate Planning Services Ltd.

The ICP platform offers a choice of over 60 different mandates from these leading money managers:

Advisory Research Investment Management

Beutel Goodman Investment Counsel

Canaccord Genuity Wealth Management

Capital Group®

Connor, Clark & Lunn Investment Management Ltd.

Guardian Capital

Jarislowsky Fraser Global Investment Management

Mawer Be Boring. Make Money.™

Manulife

River Road Asset Management®

Sentry Investments

Sionna Investment Managers®

cgf.com