

Investment Counselling Program

CANACCORD Genuity
Wealth Management

To us there are no foreign markets.™

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 best-in-class discretionary money management from renowned portfolio managers with diverse styles and investment mandates.

Your Canaccord Genuity advisor will consult closely with you to customize the ICP to your particular financial goals and risk tolerance. Regular meetings with your advisor will 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 the managers and the mandates in the Program
- A consultative process led by your Canaccord Genuity 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

Frequent 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 advisor's compensation

Expertise all around you

- Access to Canaccord Genuity's comprehensive wealth management services
- Coordinated thinking across all aspects of your financial life
- Plans and solutions to 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 30 different mandates from these leading money managers:

ADVISORY RESEARCH
INVESTMENT MANAGEMENT

BG BEUTEL GOODMAN
INVESTMENT COUNSEL

MAWER
Be Boring. Make Money.™

CAPITAL
GROUP™

CANACCORD
GENUITY

Connor, Clark & Lunn
INVESTMENT MANAGEMENT LTD.

Sionna
Investment Managers®

GUARDIAN CAPITAL
Our history. Your future.



GLOBAL
PORTFOLIO
SOLUTIONS

ETF PORTFOLIOS

JARISLOWSKY FRASER
GLOBAL INVESTMENT MANAGEMENT

Canaccord Genuity
Select Portfolios

RIVER ROAD
ASSET MANAGEMENT®

SENTRY
INVESTMENTS



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