Assante® WEALTH MANAGEMENT

Be well-advised.

At Assante Wealth Management, our mission is to deliver complete wealth management solutions for professional advisors and to support them in creating wealth and prosperity for Canadian families who entrust us with their affairs.

You can feel secure knowing that your financial needs are being looked after by an Assante Wealth Management advisor. Our core values of integrity, passion and professionalism drive our business, as we partner with you to understand your unique needs and simplify and enhance your financial well-being.

The advantages are clear.

A PROVEN TRACK RECORD, COAST TO COAST

We are one of the largest Canadian professional services firms in wealth management, supporting more than 750 advisors who oversee $32 billion in assets for 300,000 clients and their families nationwide.

COMPLETE WEALTH MANAGEMENT

Assante was a pioneer and continues to be a leader in delivering complete wealth management solutions. We believe that clients are better served by a comprehensive approach to planning that incorporates all aspects of their financial lives – risk management, estate planning, tax planning, as well as investment management.

ACCOMPLISHED ADVISORS

We are distinguished by our highly professional team of advisors and their focus on meeting your needs. Our advisors are committed to continually enhancing their skills through ongoing training, education and professional development.

BENCH STRENGTH

Your advisor is positioned to be your key resource to oversee all aspects of your financial affairs, and can work with you to provide a customized wealth management plan. But your advisor is not alone in this effort. With access to a range of professionals who are experts in their field – investment analysts, portfolio managers, lawyers, accountants, estate and insurance specialists, wealth planners, banking and mortgage specialists – your advisor can draw on these resources as needed in tailoring personalized solutions for you and your family.

INVESTMENT EXPERTISE

Your Assante advisor has access to a broad range of investment, insurance, risk management and cash managed offerings as well as an exclusive suite of managed portfolios, including Evolution Private Managed Accounts managed by CI Investments Inc. For high net worth clients with more complex wealth planning needs, we offer our exclusive Private Client Managed Portfolios through CI Private Counsel LP. With active management from portfolio managers around the world, these leading solutions combine investment expertise with wealth planning strategies.

STRONG LEADERSHIP

Our ability to deliver service and support to your advisor, so that your advisor in turn can effectively meet your needs, is dependent on the successful stewardship of the organization. We are led by a seasoned group of executives who are accredited, known for their achievements in fostering growth and innovation within the financial services industry, and have been chosen to drive the company's success now and long into the future.

FINANCIAL STRENGTH

Our parent company, CI Financial Corp. (TSX: CIX), is a diversified wealth management firm and a true success story. Since its founding 50 years ago, CI has grown into one of the top three firms in its industry, with approximately $140 billion in total assets. CI became a public company in 1994 and has established a record as one of the best-performing securities on the S&P/TSX Composite Index over that time.

To find out more, we encourage you to speak to your advisor or visit us online at **www.assante.com**.

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