

WORKING WITH
GUARDIAN PARTNERS INC.



ADVICE TO BE VALUED

*“An investment in knowledge
pays the best interest.”*

- Benjamin Franklin

FINANCIAL MARKETS ARE BECOMING MORE COMPLEX

A simple portfolio of stocks and bonds is not expected to achieve the same results going forward. Having an Investment Counsellor who can provide guidance on complex areas of the market, like alternative investments, can add value.

Advice comes in many forms – not all created equal. When it comes to your investments, listening to an expert could make all the difference.

29%

Additional expected retirement income for a retiree through wise financial planning decisions in five areas: asset allocation, withdrawal strategy, guaranteed income products, tax-efficient allocation and portfolio optimization.¹

61%

Advised investors who strongly agree their professional investment advice had a **positive impact** on the value of their investments and returns.²

2.3x

Multiple of total asset value for an average household with professional investment advice for 15 years or more versus a comparable household without.²

The evidence is clear. If you want to optimize your investments and reach your goals, you can benefit from financial advice. Investment Counsellors work with their clients and advisory network to build long-term financial objectives, taking the stress out of your hands by dedicating time to your financial health.

Isn't your financial future worth it?

OUR LONG-STANDING, ENTREPRENEURIAL APPROACH

Our **Private Investment Office** provides significant opportunities to deliver tailored and personalized client-centric solutions to help achieve your objectives.

We have been advising clients since 1997 and strive to add value beyond their portfolios, through other key areas like financial planning, family governance and advisor integration.

The Private Investment Office Model

Structure that puts you first

CONFLICT-FREE STRUCTURE

Where conflicts of interest are identified, we will take steps to manage, disclose, and where possible, eliminate the conflict. This is the foundation upon which institutional trust, true open architecture and cutting-edge solutions are built.³

NO HIDDEN FEES

Transparency of fees minimizes conflict of interest to aid better decision-making that covers portfolio construction, risk management, cost management and access to truly differentiated skill.

CULTURE OF INVESTMENT

A sophisticated, highly ethical and well-supported investment management structure for those who take their investment responsibilities seriously but lack the power of a fully formed, internal, independent investment office.³

INTANGIBLES

Provides rigorous risk management, transparency and accountability to a coordinated wealth program amongst your network of advisors.



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INSIGHTFUL SOLUTIONS.
THOUGHTFUL PARTNERSHIP.



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