GUARDIAN PARTNERS INC

ONBOARDING YOUR STAKEHOLDERS

Today, committee, board and organizational change are the norm. New directors, committee members and staff (key stakeholders) are coming onboard with ongoing regularity. While this fuels innovation and brings new energy, vigour and fresh ideas, it often poses challenges. The responsibility of quickly bringing the new stakeholder up to speed on the many parts of your organization is often concentrated in the hands of the Chair and key employees. Stakeholders are likely unaware of the specific aspects, history, parts and structure of the fund, as well as the processes to ensure your governance structure is in place to keep your investment portfolio aligned with the organization's goals and objectives.

THIS IS WHERE GUARDIAN PARTNERS INC. COMES IN.

Working in partnership with your board and management, while leveraging our unique experience and comprehensive knowledge, our New Stakeholder Education Program aims to efficiently and effectively onboard your new stakeholders.

SEVEN STEPS TO ONBOARDING STAKEHOLDERS

EFFECTIVE STAKEHOLDER EDUCATION

We can all agree on the importance of helping new directors and other stakeholders understand the specifics of the investment portfolio they are overseeing. With this in mind, our onboarding program is designed to increase the understanding and engagement of those stakeholders when it comes to the management of your investment portfolio. Armed with the right information, stakeholders can participate in decision making and rapidly add value, with confidence.

GPI OVERVIEW

The New Stakeholder Education Program begins with a brief overview of who we are, what we do and how we add value to the process. New stakeholders may not necessarily have experience working with third-party advisors and may not be aware of how we are integrated into the process of managing your investment portfolio, or the knowledge and skills we bring to the table.

OVERVIEW OF YOUR INVESTMENT PORTFOLIO – YOUR HISTORY AND TODAY

We provide a clear picture of the current structure of your investment portfolio as well as its history, including how and why the current structure was developed. Our extensive archive of historical portfolio recommendations and discussions allows us to easily answer questions regarding past and present decisions, actions and outcomes.

RISK, ASSET MIX, LIQUIDITY AND PORTFOLIO CONSTRUCTION

As part of the discussion of the current structure of your investment portfolio, we provide a complete overview of the importance of portfolio allocation and how it was determined. We cover the factors and decision-making steps involved in developing your investment portfolio's asset mix, including risk, liquidity and the goals and objectives of the organization.

INVESTMENT MANAGER STRUCTURE

The program includes a detailed look at the purpose and principles of choosing appropriate investment managers, an explanation of the manager search process, and more specifically, how these decisions were made for your investment portfolio.

ONGOING REVIEW AND OVERSIGHT

Having a fully implemented portfolio strategy is not the end of the process; rather, it is the beginning of the next, which includes continuous review and oversight to ensure all elements remain appropriate. This phase includes reviewing and presenting quarterly and ad hoc reports with stakeholders.

FIDUCIARY RESPONSIBILITY

As part of our role as a fiduciary for our clients, we have a responsibility to act in your best interest. It is within the scope of that responsibility that we advocate for stakeholder education. We believe supporting your stakeholders helps to optimize the decision-making process.

At Guardian Partners Inc., we know the true value of dedicated and engaged stakeholders. That's why we provide New Stakeholder Education whenever and as often as it is needed, at no additional cost.

Contact us to learn more about how we can help you achieve your unique financial goals.

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