

# EXPERIENCE DEDICATION INNOVATION

The Strategies and Solutions Group (“SSG”) within Guardian Partners Inc. (“GPI”) is comprised of four experienced professionals who are focused entirely on asset allocation, manager research and investment thought leadership. SSG is responsible for ongoing due diligence of the investment managers currently on our platform and for performing new manager searches striving to add innovative and best-in-class solutions to bring to our clients.

SSG combines top-down macro analysis with rigorous investment manager due diligence to identify investment opportunities and assist in the portfolio construction and asset allocation process. The team conducts research across all asset classes, including equities, fixed income, hedge funds, real estate, infrastructure, private equity, private debt and socially responsible investing.



## EXTENSIVE EXPERIENCE

- 65+ years of combined experience in investment strategy and manager research
- Extensive institutional investment experience:
  - Former CIO of the Nova Scotia Health Employees’ Pension Plan
  - Former Head of Real Assets at Albourne Partners (a leading global provider of research and advice on alternative investments)
  - Former Co-CIO of University of Toronto Asset Management
  - Former Senior investment team member at Ontario Teachers’ Pension Plan



## DEDICATED RESOURCES

- Focused exclusively on investment strategy, manager research and downside risk management to create customized solutions for GPI clients
- Structure and culture allows for timely investment recommendations



## INNOVATIVE THINKING AND BEST-OF-BREED SOLUTIONS

- Experience and capabilities in finding investment strategies and solutions across all asset classes:
  - Fixed Income
  - Private Debt
  - Real Estate
  - Infrastructure
  - Equities
  - Private Equity
  - Hedge Funds
- Applies top-down macro insights to identify attractive investment opportunities utilizing our extensive network, including world class investment managers and thought leaders

## YOUR TEAM

### Cameron Richards, MBA, LLB, CFA Chief Investment Officer

As Chief Investment Officer, Cameron Richards leads the Strategies and Solutions Group at Guardian Partners and is responsible for adding depth and breadth to GPI's research process. Previously, he served as CIO of the Nova Scotia Health Employees' Pension Plan, and was the Head of Real Assets at Albourne Partners in London, England. He also served as the Co-Chief Investment Officer of University of Toronto Asset Management (UTAM) and Chair of the Investment Committee for the university's investment assets. Before joining Guardian Partners, he founded Isengard Capital Management, which provided capital markets research to Albourne Partners and also designed a research platform which applied global macro, stock selection and quantitative strategies to generate long and short exposures in stocks.

Cameron is a lawyer and a graduate of Osgoode Hall Law School in Toronto, holds a Bachelor's Degree in Mathematics from Queen's University, earned an MBA from the Schulich School of Business and is a CFA® Charterholder.

### Payton Liu, MA Director, Investment Research

Payton Liu is Director, Investment Research for Guardian Partners. He joined GPI in 2021, assists with manager selection, and has responsibility for supporting portfolio construction, asset allocation and risk management.

Payton's 11 years of experience with University of Toronto Asset Management Corporation (UTAM) further strengthens SSG's investment research capability. At UTAM, his responsibilities included assisting with strategic and tactical asset allocation, portfolio construction, currency exposure management, investment risk management, and manager selection.

Payton has a Master's Degree in Economics from Dalhousie University and a Bachelor's Degree in Economics from the University of Western Ontario. He also published his master's thesis in the International Journal of Managerial Finance and won Best Paper Award at the Northern Finance Association.



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