



Sustainable Funds

Designed to help build and preserve wealth
while contributing to a sustainable world.

Responsible Investing Driven by ESG Integration

Institutional-Quality Portfolio Management

Diversification in one Convenient Package

Solutions that make a difference

The Sustainable Funds were designed as easy-to-use investment solutions rooted in helping you invest in a better world. Each Sustainable Fund has a critical focus on environmental, social, and governance (ESG) factors, allowing you to practice responsible investing while leveraging our decades of leadership in institutional asset management.

That means when you invest in Guardian Capital's sustainable solutions, we are putting 60 years of experience into your portfolio.*

The six Sustainable Funds are curated to offer you options when selecting the right mix of securities to support your values, goals, timeframe and tolerance for risk. Choose the solution that's right for you now, while feeling confident your investments are focused on making a positive difference for the future.



ENVIRONMENTAL

Issues affecting the natural environment



SOCIAL

Issues affecting people



GOVERNANCE

Issues related to how companies govern themselves

* Guardian Capital LP is a wholly owned subsidiary of Guardian Capital Group Limited and the successor to its original investment management business, which was founded in 1962.



Sustainable Funds

Diversified, multi-asset* ESG solutions

Sustainable Income 100 Fund

This fund holds 100% income-producing securities to emphasize income generation and help preserve capital.

Best for you if:

- ✓ You are seeking investment income and capital preservation
- ✓ You are comfortable with low investment risk

Sustainable Income 20/80 Fund

This fund targets holding 20% equities and 80% fixed income to emphasize income generation potential.

Best for you if:

- ✓ You are primarily seeking investment income with some capital preservation
- ✓ You are comfortable with low investment risk

Sustainable Balanced 40/60 Fund

This fund aims to balance income generation with capital growth by targeting a mix of 40% equities and 60% fixed income.

Best for you if:

- ✓ You are seeking a mix of investment income and capital growth
- ✓ You are comfortable with low investment risk

Sustainable Balanced 60/40 Fund

This fund aims to balance capital growth with income generation by targeting a mix of 60% equities and 40% fixed income.

Best for you if:

- ✓ You are seeking a mix of capital growth and investment income
- ✓ You are comfortable with low-to-medium investment risk

Sustainable Growth 80/20 Fund

This fund targets holding 80% equities and 20% fixed income to emphasize capital growth potential.

Best for you if:

- ✓ You are primarily seeking capital growth with some income generation
- ✓ You are comfortable with low-to-medium investment risk

Sustainable Growth 100 Fund

This fund features 100% equities for long-term capital growth potential.

Best for you if:

- ✓ You are seeking capital growth
- ✓ You are comfortable with medium investment risk

Actively making a difference.

Each Sustainable Fund applies a high standard of ESG oversight, based upon disciplined and objective scrutiny from our experienced Responsible Investing team. In practice, this means screening each underlying fund to ensure its fund manager is a signatory of the United Nations-supported Principles of Responsible Investment, and to ensure it continuously meets established sustainability thresholds, as measured by Morningstar® Sustainability Ratings.™

* The Sustainable Funds are multi-asset solutions that aim to achieve their investment objectives primarily through investment in Guardian mutual funds and ETFs and/or third party mutual funds and ETFs (the "underlying funds").



Why is a Morningstar® Sustainability Rating™ important?

A Morningstar® Sustainability Rating™¹ helps investors understand the vulnerability of their investment portfolios to ESG issues; funds rated “High” indicate they are exposed to very little ESG risk vs. other comparable funds, while funds rated “Low” indicate they are exposed to considerable ESG risk. By including “High” and “Above Average” rated underlying funds within their portfolios, the Sustainable Funds aim to offer investment solutions with a focus on minimizing ESG risks, while the underlying funds managed by Guardian Capital LP exercise active ownership to influence companies’ approach to global sustainability efforts.

Tenured Professionals that bring Experience to every Decision

The Sustainable Funds’ investment team is comprised of forward-thinking, adaptive active managers that aim to deliver sustainable returns through sustainable solutions.



Denis Larose
Chief Investment Officer
Guardian Capital LP



Adam Murl
CFA, MA, Vice President
Retail Research & Portfolio Manager
Guardian Capital LP



David Onyett-Jeffries
CFA, MA, Vice President
Multi Asset Class Solutions
Guardian Capital LP

► Your prosperity journey starts here.

Contact your financial advisor to discuss how Guardian’s investment solutions can help optimize your portfolio.

www.guardiancapital.com/investmentsolutions
insights@guardiancapital.com | 1-866-383-6546

¹ The Morningstar® Sustainability Rating™ is intended to measure how well the issuing companies of the securities within a fund’s portfolio are managing their environmental, social, and governance (“ESG”) risks and opportunities relative to the fund’s Morningstar category peers, and is updated monthly. The Morningstar Sustainability Rating is depicted by globe icons where 5 globes equals High ranking (lowest ESG Risk) and 1 globe equals Low ranking (highest ESG Risk) compared to category peers, based off each fund’s Morningstar® Portfolio Sustainability Score™. A Sustainability Rating is assigned to any fund that has more than half of its underlying assets receiving an ESG Risk Rating from Sustainalytics, and is within a Morningstar Category with at least 10 scored funds; therefore, the rating it is not limited to funds with explicit sustainable or responsible investment mandates. Please refer to <http://corporate1.morningstar.com/SustainableInvesting/> for more detailed information about the Morningstar Sustainability Rating and its calculation. Sustainalytics is an ESG and corporate governance research, ratings, and analysis company affiliated with Morningstar, Inc. © 2022 Morningstar®. All Rights Reserved. The information contained herein: (1) is proprietary to Morningstar and/or its content providers; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete or timely. Neither Morningstar nor its content providers are responsible for any damages or losses arising from any use of this information. Past performance is no guarantee of future results. Morningstar is an independent organization that groups investment funds with generally similar investment objectives for comparison purposes and ranks them on a historical basis. Ratings and/or ranking information is portfolio-based, not performance-based and is subject to change monthly. They do not reflect a fund’s performance on either an absolute or risk-adjusted basis, nor are they a qualitative Morningstar evaluation of a fund’s merits. They should not be the sole basis for an investment decision.

Please read the Fund Facts or prospectus before investing. Important information about the Sustainable Funds is contained in its prospectus. Contact your advisor or visit the Sustainable Funds’ website at: www.guardiancapital.com/investmentsolutions or www.sedar.com to obtain a copy of the Fund’s prospectus and Fund Facts. Commissions, trailing commissions, management fees and expenses all may be associated with investments in mutual funds. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. These mutual funds are offered in Canada only. This information is not intended for distribution into any jurisdiction where such distribution, publication, availability or use is restricted by law or regulation. This communication is for informational purposes only and does not constitute investment or financial advice or a recommendation to buy, sell or hold a security, and shall under no circumstances be considered an offer or solicitation to deal in any product or service mentioned herein.

Responsible investing may incorporate considerations beyond traditional financial information into the investment selection process. This could result in investment performance deviating from other products with comparable objectives or broad market benchmarks. Please review the Fund’s prospectus for details on how the Fund’s investment strategy incorporates responsible investing considerations and the associated risks, and consult your financial professional prior to investing. Guardian Capital LP is a signatory of the UN-supported Principles for Responsible Investment (UN PRI), and our Responsible Investing policies are publicly available on our website at: <https://www.guardiancapital.com/investmentsolutions/responsible-investing>.

Guardian Capital LP manages portfolios for defined benefit and defined contribution pension plans, insurance companies, foundations, endowments and investment funds. Guardian Capital LP is wholly-owned subsidiary of Guardian Capital Group Limited, a publicly traded firm listed on the Toronto Stock Exchange. For further information on Guardian Capital LP and its affiliates, please visit www.guardiancapital.com. Guardian, Guardian Capital, the Guardian Capital logo, are all trademarks of Guardian Capital Group Limited. © 2022 Guardian Capital.

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