



GUARDIAN CAPITAL

Press Release

Guardian Capital LP Announces Partnership with Retirement Expert Moshe A. Milevsky

Exclusive collaboration provides Canadian-based investment advisors access to thought leadership and tools

TORONTO, September 14, 2020 – Guardian Capital LP (Guardian Capital) is pleased to announce that it has joined forces with Professor Moshe A. Milevsky, world-renowned speaker, commentator and expert in the realm of retirement finance. Frequently sought out by government and practitioners to help educate about, and craft solutions to address, modern challenges in the retirement income market, Professor Milevsky is an award-winning thought leader, and is excited to collaborate with Guardian Capital, on an exclusive basis in Canada, to provide his knowledge, experience and speaking prowess to the advisor community.

Having published 15 books and over 60 peer-reviewed papers, as well as hundreds of popular articles and blog pieces, Professor Milevsky has been long sought as a presenter and commentator by some of the largest financial companies in Canada and the United States. Guardian Capital is extremely pleased to be able to create a consistent avenue for the investment advisor community in Canada to benefit from his latest thinking and advice.

“The collaboration with Professor Milevsky aligns perfectly with Guardian Capital’s newly created positioning for its solutions available to retail investors – Guardian Create™ and Guardian Prosper™ – that correspond to the two main phases of an individual’s financial life-cycle: the accumulation phase, followed by the decumulation phase,” said Barry Gordon, Managing Director and Head of Canadian Retail Asset Management. “We are extremely excited to be partnering with Moshe and are focused on becoming a market leader in providing thought leadership and best-in-class solutions to address retirement income challenges and portfolio longevity,” added Gordon. “This will be a key area of collaboration for us and we will be working together to develop new and innovative retirement income solutions to address the particular needs of the growing proportion of Canadian investors who are increasingly focused on generating higher income and extending the life of their portfolios.” Please visit www.guardiancapital.com/investmentsolutions for more information on how Guardian Capital has adopted an outcomes-based approach to providing investment expertise through its solutions.

“One of the reasons I chose Guardian Capital as a collaborative partner is their willingness to be innovative in designing outcome-focused solutions,” said Moshe Milevsky. “There is an acute need for innovation to solve the growing challenges, and education around how to think about retirement income, portfolio longevity, and issues like sequence-of-return risk,” added Milevsky. “I am excited to apply cutting-edge design ideas to the ‘real world’ and the prospect of what we will accomplish together.”

On August 11, 2020, Guardian Capital launched its inaugural suite of actively managed Exchange Traded Funds (Guardian ETFs) that align with the Guardian Create™ and Guardian Prosper™ journeys:

Guardian Create™

Guardian i³ Global Quality Growth ETF (TSX listed GIQG and GIQG.B (currency unhedged))

Guardian i³ US Quality Growth ETF (TSX listed GIQU and GIQU.B (currency unhedged))

Guardian i³ Global REIT ETF (TSX listed GIGR and GIGR.B (currency unhedged))

Guardian Prosper™

Guardian Directed Equity Path ETF (TSX listed GDEP and GDEP.B (currency unhedged))

Guardian Directed Premium Yield ETF (TSX listed GDPY and GDPY.B (currency unhedged))

Guardian Capital is well known for its over 50 year history of providing best-in-class investment management expertise to institutional investors in Canada and around the world, high net worth families and advisor-served clients. We are extremely proud to be able to now add our collaboration with Professor Milevsky to this deep history, and look forward to adding value to the relationships that investment advisors have with their clients by providing thought leadership, best practice tools and innovative solutions to the every-day investment challenges faced by Canadians.

About Guardian Capital LP

Guardian Capital LP is the manager and portfolio manager of the Guardian Capital Funds and each of the Guardian ETFs. Additionally, Guardian Capital manages portfolios for defined benefit and defined contribution pension plans, insurance companies, foundations, endowments and third-party mutual funds. Guardian Capital is a wholly-owned subsidiary of Guardian Capital Group Limited. For further information on Guardian Capital, please visit www.guardiancapital.com.

About Guardian Capital Group Limited

Guardian Capital Group Limited is a diversified financial services company founded in 1962. Guardian operates in two main business areas, Asset Management and Financial Advisory. As of June 30, 2020, Guardian had C\$31.2 billion of assets under management and C\$20 billion of assets under administration. Guardian offers institutional and private wealth investment management services; financial services to international investors; services to financial advisors in its national mutual fund dealer, securities dealer, and insurance distribution network; and maintains and manages a proprietary investment portfolio, which had a fair market value of C\$511 million at June 30, 2020. Its Common and Class A shares are listed on the Toronto Stock Exchange; in 2019, Guardian celebrated 50 years as a listed company. To learn more about Guardian, visit www.guardiancapital.com.

About Moshe A. Milevsky, PhD

Professor Milevsky is a professor, well-known thought-leader, speaker, writer and entrepreneur in the field of retirement income planning. Named by Investment Advisor magazine (in the US) as one of the 35 most influential people in the financial advisory business during the last 35 years, he received a lifetime achievement award from the Retirement Income Industry Association in 2008. Dr. Milevsky has published 15 books and over 60 peer-reviewed scholarly articles. His book: King William's Tontine: Why the Retirement Annuity of the Future Should Resemble Its Past, published by Cambridge University Press was granted the Kulp-Wright (ARIA, 2017) award for the most important contribution to insurance.

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Commissions, trailing commissions, management fees and expenses all may be associated with an investment in exchange traded funds (ETFs). Please read the prospectus before investing. Important information about the ETFs is contained in their prospectus. ETFs are not guaranteed; their values change frequently and past performance may not be repeated. You will usually pay brokerage fees to your dealer if you purchase or sell units of an ETF on the TSX. If the units are purchased or sold on the TSX, investors may pay more than the current net asset value when buying units of the ETF and may receive less than the current net asset value when selling them.