



**YOUR CONFIDENCE.**

**OUR COMMITMENT.**

Canaccord Wealth Management is Canada's premier independent investment dealer providing a wide range of investment products and solutions. As a recognized leader in wealth management, we are driven by an unwavering commitment to help our clients achieve their financial goals. It's a commitment to bring you sound, unbiased investment advice, from Advisors who have the freedom to recommend the most appropriate investment products and solutions available. It's a commitment to helping you through all types of market conditions and all kinds of life events.

It's our commitment to *you*.

#### **ABOUT CANACCORD**

*Through its principal subsidiaries, Canaccord Financial Inc. is a leading independent, full-service financial services firm, with operations in two principal segments of the securities industry: wealth management and global capital markets. Since 1950, Canaccord has been driven by an unwavering commitment to build lasting client relationships. We achieve this by generating value for our individual, institutional and corporate clients through comprehensive investment solutions, brokerage services and investment banking services.*

*Canaccord Financial Inc. is publicly traded under the symbol CF on the TSX and the symbol CF on AIM, a market operated by the London Stock Exchange.*

*Canaccord Wealth Management is a division of Canaccord Genuity Corp., a wholly-owned subsidiary of Canaccord Financial Inc. and a Member of the Canadian Investor Protection Fund and the Investment Industry Regulatory Organization of Canada.*

## Our Commitment To Clients

At Canaccord Wealth Management, we pride ourselves on providing service that surpasses our clients' expectations and is responsive to their needs. Our Advisors have complete freedom to match your investment needs with the most appropriate investment solutions for your financial strategy and goals.

We strive to achieve strong, results-oriented relationships with our clients, and understand the importance of executing solid investment strategies. Your interests are always paramount. The safety of your investments is always top of mind.

## Our Commitment To Your Wealth Strategy

Complete Canaccord is a comprehensive process that encompasses all your wealth management and financial planning needs. It enables you to incorporate all aspects of your finances into one cohesive plan. By doing so, you and your Advisor can discuss and better evaluate ways to ensure you benefit most from your financial decisions.

At the core of our Complete Canaccord offering is the Wealth Planning Process. Your Canaccord Advisor will guide you through our comprehensive four-step approach to help you achieve your financial goals, while drawing on the experience and expertise of our extensive financial and estate planning resources.



**1**

### COMPLETE CANACCORD WEALTH ASSESSMENT

A personal consultation with your Canaccord Advisor.

**2**

### COMPLETE CANACCORD WEALTH STRATEGY

A Wealth Strategy is tailored for your unique financial needs and goals.

**3**

### WEALTH STRATEGY IMPLEMENTATION

Your Canaccord Advisor actively completes your Wealth Strategy and provides ongoing investment counsel.

**4**

### MONITOR AND REVIEW

We continually monitor and review the success of your portfolio and suggest ways to rebalance it when necessary.

Consistently successful investment performance is most often the result of a rigorous planning process. The Complete Canaccord Wealth Planning Process helps you meet your financial goals by following a similarly disciplined approach.

When you join Canaccord as a client, you are partnered with an established and respected organization entrusted to protect and grow your investments through a strategy tailored exclusively for you.

*Please contact a Canaccord Advisor for more information about Canaccord Wealth Management and our services.*

[www.canaccord.com](http://www.canaccord.com)

# OUR COMMITMENT TO OUR VALUES.

**Canaccord Advisors are driven by core company values.  
Living up to these values is something we take great pride in.**

**WE PUT OUR CLIENTS FIRST.**

**A GOOD REPUTATION IS OUR MOST VALUED CURRENCY.**

**IDEAS ARE THE ENGINE OF OUR BUSINESS.**

**WE ARE AN ENTREPRENEURIAL, HARD-WORKING CULTURE.**

**WE STRIVE FOR CLIENT INTIMACY.**

**WE ARE DEDICATED TO CREATING EXEMPLARY SHAREHOLDER VALUE.**

**WE ARE COMMITTED TO EXCELLENCE IN OUR FOCUS AREAS.**

MEMBER OF ALL CANADIAN STOCK EXCHANGES  
OFFICES IN MAJOR CENTRES ACROSS CANADA

[www.canaccord.com](http://www.canaccord.com)

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**CANACCORD** Wealth  
Management