ELEVATE

T·E·WEALTH

Your life. Your legacy.

Elevate your investment strategy by partnering with the right name.

A FOCUSED AND DISTINCTIVE APPROACH TO INVESTMENT MANAGEMENT

T.E. Wealth has provided its services to private clients, First Nations groups, not-for-profit organizations, endowments and pension funds across the country for more than two decades. We look after both private and institutional investors who require customized investment advice coupled with a focus on risk management. Our team of experienced Investment Counsellors relies on three distinctive investment principles to help clients meet their specific objectives:

1. Developing and maintaining a sound investment policy is critical for long-term investment success.
2. Blending asset classes, geographies and manager styles decreases risk, evens out returns, and reduces the temptation to make costly market timing decisions.
3. Despite the relative efficiency of capital markets, investment managers can add value over time.

Comprehensiveness, responsiveness and integrity guide everything we do.

A carefully managed, tailored investment process

Our experienced Investment Counsellors work with you to develop a customized investment policy and portfolio strategy designed to meet your specific goals. We carefully manage risk by combining asset classes and complementary investment styles, in an effort to control risk exposure, while keeping you on track. Our investment process is based on the merits of long-term strategic asset allocation, regular, values-based rebalancing with predetermined trade triggers, rigorous manager selection criteria, regular monitoring, and consolidated client reporting.

Investment analysis and planning

Your asset mix and investment policy ranges will be determined after we conduct a rigorous analysis of your return objectives, risk tolerance, spending practices and any other constraints.

Investment manager selection

We diligently screen an extensive universe of Investment Managers in order to identify those with a proven history of performance and stability. We then construct portfolios that are diversified across multiple managers and investment styles, in order to provide well diversified risk-controlled solutions.

Portfolio structure and design

One size does not fit all, particularly when it comes to investing. That's why we research numerous managers in order to recommend diversified solutions best suited to each client's specific goals and objectives.

Measurement and reporting

Manager monitoring and evaluation is extensive and ongoing; we provide consolidated quarterly reports that clearly compare overall portfolio performance with relevant benchmarks and established return objectives.

Periodic review and adjustment

Knowledge is power, so we provide you with just that. You receive clear reporting, regular portfolio reviews and one-on-one attention in order to adjust or address any changes in your goals and needs.

Our expertise and service offerings extend into many specialized areas.

Beyond offering strategies for institutional clients, T.E. Wealth also offers services for institutional collectives, high-net-worth individuals and First Nations groups.

Smaller scale institutional investing

Smaller charities, endowment funds and not-for-profit organizations rely on T.E. Wealth for expert investment advice to help grow their funds while effectively managing risk. Our comprehensiveness, responsiveness and integrity helps ensure that over the long term, funds are kept safe while the investments enjoy good returns.

Institutional-style investing for individuals

Often, individuals within organizations wish to employ our institutional investment strategies for their personal investments. To address this, T.E. Wealth offers customized asset allocation strategies, multi-manager and multi-style investment portfolios for individuals, at competitive pricing without sales fees. T.E. Wealth clients have access to direct-to-manager accounts via segregated and/or pooled funds with our approved Investment Managers or our proprietary managed platform: the Prosperity pooled fund program.

Indigenous Services

Trust and Investment Advisory Services

At T.E. Wealth, we view our role very simply….to utilize our expertise, experience, technology and infrastructure to assist our clients in making educated and well informed decisions surrounding all facets of the Trust and investment management process based on local circumstances. We work with community trustees and leadership to provide the necessary advice, methodology and support with the ultimate objective of developing the most efficient and cost effective solution for both today and the future.

Our support includes:

- Setting a vision and establishing community priorities
- Managing community change through effective communication and financial education including specific member consultation and engagement
- Investment and trust education including governance training
- Getting the team together which includes search and selection support services to assist in the identification of the most appropriate firms for “the team” (e.g. Legal, Corporate/Administrative Trustees, Investment Management)
- Development of the Statement of Investment Policies and Guidelines
- Assistance in the design of the most cost effective portfolio structure
- Investment Manager search and selection
- Investment performance monitoring, measurement and interpretation

Ready to take your business to the next level? Talk to us.

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To learn more about T.E. Wealth, please contact us: www.tewealth.com · 1-888-505-8608

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