



MAKING SENSE OF THE INVESTING LANDSCAPE

Your financial situation and planning needs are unique to you. That's why our suite of investment options are designed to give you choices when it comes to meeting your individual investment and retirement goals.

Investment options available through us:

Robo- Investing through CI Direct Investing

- Professionally managed and monitored ETF and Private Pool portfolios with alternative asset class diversification opportunities
- Fees up to 60% less than traditional mutual funds
- Fully digital account opening and service and convenient app to access and perform transactions in your portfolio 24/7

Segregated Funds and Annuities through all major insurers

- Maturity and death benefit guarantees
- Lifetime income options
- Estate planning benefits and potential creditor protection

Access to Private Wealth firms and Portfolio Managers

- Discretionary money management for high net-worth accounts, business owners, executives, and family enterprises
- Access to preferred investments and alternative asset classes
- Concierge service with your own Portfolio Manager, exceptional diversification, lower volatility, and advanced tax planning support

Each of these alternatives has a track record of preserving capital in volatile markets, and providing risk based diversification. Our process is to sit down with you to understand your full financial picture, and then to help you assess what combination works best for you.

Contact us today to review your situation, build a plan, and to get started on a solution tailored for you.