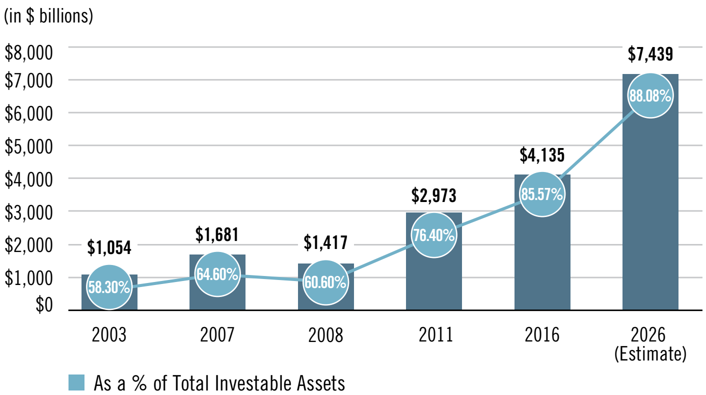
PRIVATE WEALTH SERVICES

Investment management for affluent Canadian investors

A GROWING OPPORTUNITY

By 2020, the HNW segment will control ⅘ of all investable assets.



Source: Investor Economics 2016.

How do you participate?

Fiduciary Trust Canada is uniquely equipped to assist you in participating in this opportunity. Fiduciary Trust Canada and its predecessors have been successfully offering private client investment management solutions and integrated financial services to Canadian investors for over 35 years. We focus on two key areas of wealth management: discretionary investment counseling and estate and trust services.

By partnering with us you can respond to your clients' needs by developing customized, discretionary portfolios while building your book of business in this growing segment.

We will also work with you to solidify relationships with existing clients and help acquire new clients seeking a customized level of service befitting their wealth status.

How introducing discretionary investment management can benefit your practice

- Keeps you fully competitive with peers who are increasingly focused on the affluent investor
- Limits "money in motion" risks by moving from a transaction based relationship to customized counseling
- Strengthens your relationships and increases the number of touch points you have with clients
- Allows you to present more customized, sophisticated and comprehensive investment options, tailored to specialized financial goals and needs
- Eligibility minimums[1] increase the likelihood of consolidating accounts and identifying assets you may not even know a client possesses
- Increases the chance of referrals and helps secure your book of business as it relates to your own business succession plans

Benefits of discretionary investment services with Fiduciary Trust Canada to your clients

- A wealth of expertise and a complete range of solutions backed by the worldwide investment expertise of our parent Franklin Templeton Investments
- Fully discretionary investment management enables your client to delegate day-to-day investment decisions to investment professionals within the parameters of the investment objectives
- Active portfolio management and rebalancing that focus on risk management and risk-adjusted returns
- Commitment to service including personalized attention of a dedicated Portfolio Manager and an assigned Fiduciary Trust Canada Service Associate, and on-going investment counseling through our Private Wealth Counselors to ensure you and your clients receive support every step of the way
- Comprehensive reporting and portfolio manager reviews
- Highly competitive fees and tiered pricing

1. $1 million. Our discretionary services offer clients a sliding fee scale based on assets under management. Please note that in order to offer Fiduciary Trust Company of Canada's discretionary investment services a Dealer Referral Agreement must be in effect.

Dealer Use Only

How we work with you and your clients

As part of the Franklin Templeton group of companies, Fiduciary Trust Canada has direct access to the worldwide investment expertise of Franklin Templeton Investments. A full range of tax-efficient strategies and integration with executor and/or trustee services are also offered to address today's high net worth needs. Our unique and advisor-centric approach is structured to help both you and your clients' interests prosper.

Fiduciary Trust Canada offers the support and guidance to help you achieve success:

- Identify prospects and introduce the benefits of discretionary investment services.
- Assign dedicated portfolio management and support personnel.
- Develop a customized Investment Policy Statement based on your client's financial assets and needs.
- Provide regular, transparent reporting to you and your clients.
- Perform annual reviews with clients and their advisor.

Fiduciary Trust Canada can help you tie high value clients to your business, consolidate more assets and successfully build a transferable book.

For more information on how Fiduciary Trust Canada can assist your business, please contact one of our Private Wealth Counsellors.

Calgary
350 Eighth Avenue SW, Suite 1940
Calgary, Alberta, Canada T2P 1C9
(800) 574-3822

Toronto
200 King Street West, Suite 1500
Toronto, Ontario, Canada M5H 3T4
(800) 574-3822

Montreal, Canada
1002 Sherbrooke Street West, Suite 1940
Montreal, Quebec, Canada H3A 3L6
(800) 574-3822

FIDUCIARY TRUST COMPANY OF CANADA and its predecessors have specialized in investment management for individuals and families since 1982. A federal trust company license enables Fiduciary Trust Canada to act as executor and trustee, thereby allowing it to provide continuity of wealth management through multiple generations. As part of the Franklin Templeton group of companies, Fiduciary Trust Canada has direct access to the worldwide investment expertise of Franklin Templeton Investments.* These global resources enable Fiduciary Trust Canada to design wealth management solutions unique to each client.

Fiduciary Trust Canada

FRANKLIN TEMPLETON INVESTMENTS

*Fiduciary Trust Company of Canada is an indirect wholly owned subsidiary of Franklin Resources Inc., a global investment organization operating as Franklin Templeton Investments.

Dealer Use Only

FTCC OVER 07/18