THE ADVANTAGES ARE CLEAR

At CI Assante Wealth Management, our mission is to deliver complete wealth management solutions for professional advisors and to support them in creating wealth and prosperity for Canadian families who entrust us with their affairs.

You can feel secure knowing that your financial needs are being looked after by an Assante Wealth Management advisor. Our core values of integrity, passion and professionalism drive our business, as we partner with you to understand your unique needs and simplify and enhance your financial well-being.

A PROVEN TRACK RECORD, COAST TO COAST

We are one of Canada's largest firms providing wealth management solutions. Our 900 professional advisors, located in communities throughout the country, have approximately $46 billion of Canadians' family wealth under their care.

COMPLETE WEALTH MANAGEMENT

CI Assante Wealth Management ("Assante") was a pioneer and continues to be a leader in delivering complete wealth management solutions. We believe that clients are better served by a comprehensive approach to planning that incorporates all aspects of their financial lives — investment, retirement, insurance, tax, estate and philanthropic planning.

ACCOMPLISHED ADVISORS

We are distinguished by our highly professional team of advisors and their focus on meeting your needs. Our advisors are committed to continually enhancing their skills through ongoing training, education and professional development.

BENCH STRENGTH

Your advisor is positioned to be your key resource to oversee all aspects of your financial affairs, and can work with you to provide a customized wealth management plan. But your advisor is not alone in this effort. With access to a range of professionals who are experts in their field — investment analysts, portfolio managers, lawyers, accountants, estate and insurance specialists, wealth planners, banking and mortgage specialists — your advisor can draw on these resources as needed to tailor personalized solutions for you and your family.

INVESTMENT EXPERTISE

Your Assante advisor has access to a broad range of investment, insurance, risk management and cash management offerings, as well as an exclusive suite of managed portfolios, including Evolution Private Managed Portfolios managed by CI Investments Inc. For high net worth clients with more complex wealth planning needs, we work exclusively with the professionals of CI Assante Private Client, a division of CI Private Counsel LP. Using active management from portfolio managers around the world, these leading solutions combine investment expertise with wealth planning strategies.

STRONG LEADERSHIP

Our ability to deliver service and support to your advisor, so they can effectively meet your needs, is dependent on the successful stewardship of our organization. We are led by a seasoned group of executives who are accredited, known for their achievements in fostering growth and innovation within the financial services industry, and have been chosen to drive the company's success now and long into the future.

FINANCIAL STRENGTH

Assante benefits from the financial strength and resources of its parent company, CI Financial Corp. ("CI"). Since its founding 55 years ago, CI has grown into a global asset and wealth management company with approximately $194 billion in assets (as of September 30, 2020). CI became a public company in 1994 and is listed on the S&P/TSX Composite Index under the symbol CIX.

To find out more, we encourage you to speak to your advisor or visit us online at assante.com.

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