



Complete Canaccord

CANACCORD | Genuity
Wealth Management

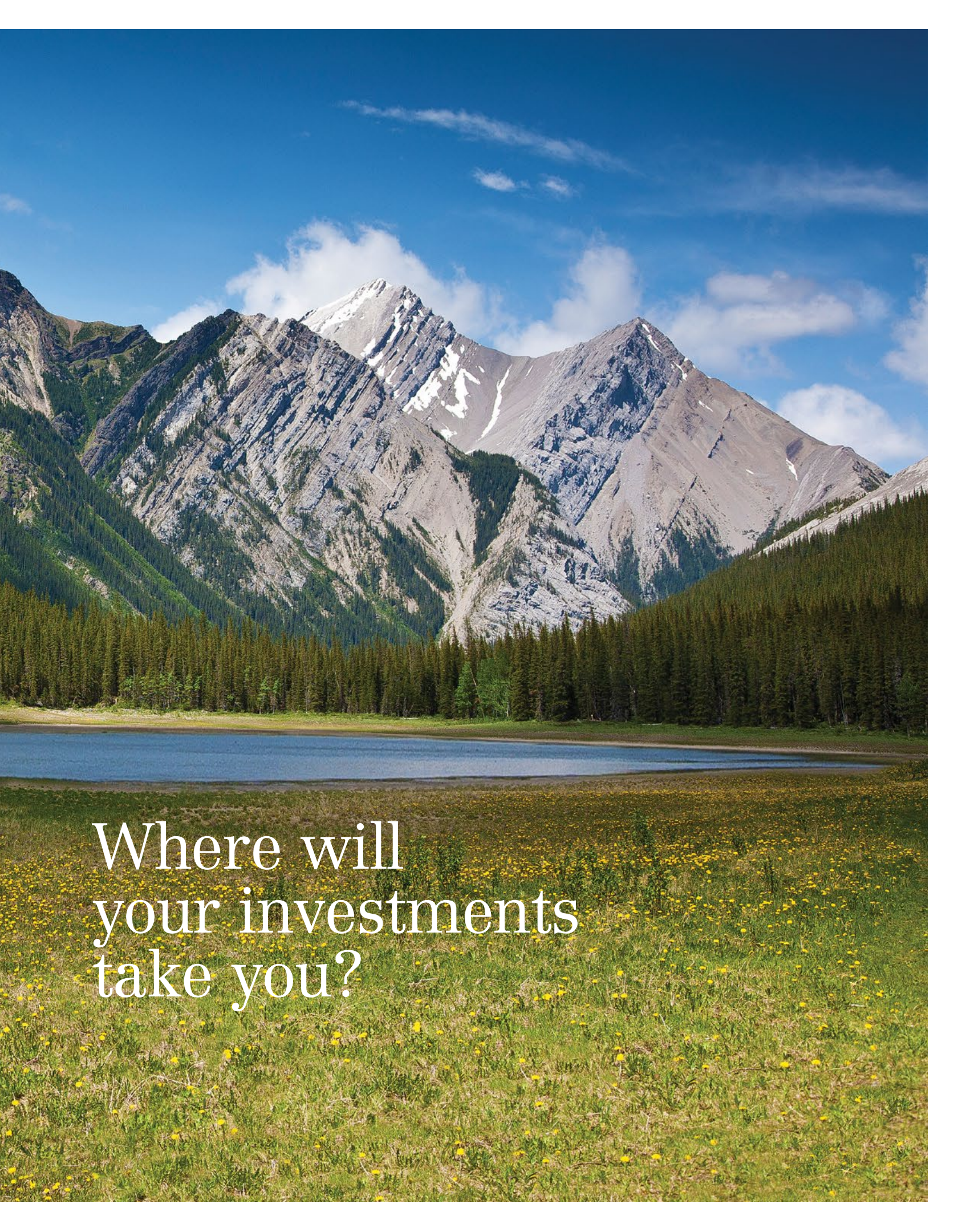
To us there are no foreign markets.™

A scenic mountain landscape with two cyclists in a field of yellow flowers in the foreground. The background features a large, rugged mountain range under a clear blue sky. The foreground is a lush green field filled with numerous yellow wildflowers. Two cyclists are riding away from the viewer across this field. In the middle ground, there is a calm lake reflecting the surrounding greenery. The mountains in the background are steep and rocky, with some patches of snow or light-colored rock near the peaks. The overall scene is bright and vibrant, suggesting a clear, sunny day.

N52°87'31"
W118°8'22"

INVESTMENT OUTCOME
TAKING THE HIGH ROAD, JASPER, ALBERTA

Your life has a geography. Where you're from, where you're going, where you aspire to be. More often than not, that geography is global. By asking our clients, "Where will your investments take you?" we are able to customize our services to help successful families like yours reach the coordinates that define their life goals.



Where will
your investments
take you?

Canaccord Genuity Wealth Management is a premier global, independent wealth management firm. Founded in Canada in 1950, today we serve successful businesses and families in major cities across Canada, the U.S., the U.K., Europe, Australia and Asia.


Your Canaccord advisor has exclusive access to extensive resources, including:

- An award-winning research team that identifies the best investment opportunities within and beyond Canada's borders
- World-class portfolio managers who recommend skillfully positioned global asset allocation strategies
- A flexible investment platform that enables advisors to choose impartially from a wide universe of investment solutions to meet your specific needs
- Evolving wealth planning solutions that adapt as global markets and your personal circumstances change

As a result, your advisor can design sophisticated, innovative, forward-thinking portfolios that are customized to meet the most complex financial needs. Based on in-depth conversations focused on your priorities, we will work together to craft a plan that expertly meets your financial objectives, mitigates taxation and leads you confidently towards the future you envision.

Bringing you outstanding investment ideas from around the world

The industry-recognized, leading-edge research of the Canaccord Genuity Global Research Team clarifies current events and helps investors benefit from market trends. The team analyzes approximately 1,000 companies, listed on 10 exchanges, in 18 key sectors of the global economy, identifying value and defining risk for our clients. You have privileged access to the team's proprietary research reports through the Canaccord Research portal, available through the Client Login at canaccord.com/ca.



N52°22'39''
E4°53'32''

INVESTMENT IDEA
ALTERNATIVE ENERGY, NETHERLANDS

Canaccord advisors have access to the top-rated Canaccord Genuity Global Research Team, whose analysts around the world uncover outstanding investment ideas.

Portfolio management

With today's investment markets more complex and globally interconnected, many investors put their trust in professional portfolio management to build and protect wealth.

Your Canaccord advisor can provide portfolio management support that ranges from individual security selection to comprehensive, diversified and customized managed portfolios. You benefit from:

- Multiple strategies and tactics coordinated to achieve your goals
- Asset allocation that incorporates traditional and alternative asset classes
- Focus on wealth planning that aligns your investments with your overall financial objectives
- Transparent fees that reward your advisor for your portfolio's performance

Our clients can choose an account structure that best meets their individual needs – including the Complete Canaccord Fee-Based Account, Complete Canaccord Investment Counselling Program and Complete Canaccord Private Investment Management.

We also offer a full range of registered plans, including Tax-Free Savings Accounts, Registered Retirement Savings Plans, Registered Retirement Income Funds and Registered Education Savings Plans, as well as solutions such as Individual Pension Plans for business owners and professionals. Your advisor can steer you towards the best solutions for your distinct circumstances.

N49°66'11''
W103°85'25''

INVESTMENT IDEA
CANADIAN AGRICULTURE, SASKATCHEWAN

The Canaccord Genuity Global Research Team has an exceptional track record for identifying compelling investment ideas within and beyond Canada. To us there are no foreign markets.™



Our consultative process

Your Canaccord advisor follows a results-oriented, four-step wealth planning process that ensures a disciplined approach to enhancing your wealth.

Step 1

Create your Complete Canaccord Client Profile

We believe that effective wealth management requires coordinated thinking across all aspects of your financial affairs, allowing you to gain strong control over your financial well-being.

Your Canaccord advisor will guide you through a broad discussion focused on your values, responsibilities, interests, overall assets, financial needs and desired investment outcomes to create your Client Profile. This important document enables your advisor to personalize all available strategies and services to your financial objectives.

Step 2

Construct your Complete Canaccord Wealth Strategy

Achieving your goals is only possible with a customized strategy that guides you towards the right decisions. Using all the details in your Client Profile, your advisor will work with you to construct a proactively managed and nimble wealth and estate planning strategy.

Your Wealth Strategy contains specific and measurable milestones to keep you and your advisor on the right financial course towards your goals.

Step 3

Implement your Complete Canaccord Wealth Strategy

Once you and your advisor have come to a mutual agreement on your Wealth Strategy, it will be put into action. If needed, your advisor will engage a network of wealth and estate planning specialists* to implement specific financial planning strategies.

Step 4

Regular Progress Meetings

You and your advisor establish the frequency of Progress Meetings to review your investment portfolio and your advancement towards your goals. These meetings allow you to discuss any updates to your Client Profile, or changes to your individual, professional or family circumstances. If any of your investments are not moving you towards your goals, your advisor may recommend suitable alternatives.

*Insurance and estate planning services are offered by Canaccord Genuity Wealth & Estate Planning Services Ltd.

A large, grey dolphin is swimming in clear blue water, looking towards the camera. Below it, three divers in black wetsuits and masks are swimming. One diver in the center is wearing a yellow BCD. The scene is set in a deep blue ocean with sunlight filtering through the surface.

N26°03'41''
W77°20'59''

INVESTMENT OUTCOME
FAMILY ADVENTURE, BAHAMAS

Whether you want your whole family to get scuba-certified and visit the world's great dive sites, or enjoy a different series of adventures, Complete Canaccord gives you the peace of mind and time to focus on your family goals.

Expertise all around you

We understand how important it is to work with an individual you can trust to look after your financial well-being and who knows your financial affairs inside and out. As a Canaccord client, you get even more than that. Your dedicated Canaccord advisor draws on a team of highly experienced financial planning, insurance, tax and investment experts to provide you with comprehensive planning in 10 important areas.



*Insurance and estate planning services are offered by Canaccord Genuity Wealth & Estate Planning Services Ltd.

**Services provided through external relationships.



N35°19'61''
W79°46'42''

INVESTMENT OUTCOME
GOLFING WITH FRIENDS
PINEHURST, NORTH CAROLINA

You've worked hard to achieve your wealth, so our principal objective is to help you protect it.

Our clients' top priorities

We afford our clients the luxury of simplicity through our comprehensive wealth and estate planning services.

Financial and retirement planning

Your wealth is much more than a portfolio of stocks and bonds. It includes your home, your income, perhaps a cottage, collectibles like artwork and even the potential of an inheritance. Financial planning enables you to gain a big picture view of your overall wealth. A comprehensive financial plan provides you with a strategic approach to protecting and harmonizing the benefits of those various assets, often enabling you to realize your life goals sooner.

In addition, a sound financial plan enables you to protect your financial well-being through natural and unexpected life changes. It even eases the transition from one life stage to the next. Your financial plan lays the foundation for your retirement plan, enabling you to optimize retirement strategies and enjoy financial independence throughout your adult life.

Tax planning

Taxes can have a significant impact on your wealth and estate. One of the key benefits of Complete Canaccord is collaborative thinking across investment strategy and tax planning. We can help you plan the most tax-efficient ways of holding your investments and overall assets, while guiding you through changing tax regulations. In addition, your Canaccord advisor will work closely with our Wealth and Estate Planning Specialists,* as well as your accountant and other tax professionals, to mitigate or eliminate tax.

Wealth protection

To protect your wealth in ways that go beyond tax planning, we can customize a wide array of creditor protection insurance solutions and guaranteed income offerings.

Insurance

Canaccord's open-architecture platform allows us to present you with the full range of insurance solutions from all the major carriers. We will offer you suitable options customized to your specific wealth and estate planning needs.


Wealth transfer

We work closely with you and qualified specialists to develop a framework that ensures your estate passes to your intended heirs efficiently and in accordance with your wishes. This framework includes estate tax strategies* to optimize your wealth transfer.

Legacy planning

We can provide you with guidance to implement planned giving strategies, from donation of shares to creating a foundation. And we will work closely with the individuals and institutions involved in creating your family legacy.

*Insurance and estate planning services are offered by Canaccord Genuity Wealth & Estate Planning Services Ltd.



N49°36'67"
N123°16'69"

INVESTMENT OUTCOME
SECURING YOUR CHILDREN'S FUTURE,
VANCOUVER

We understand that you want to give the world to your children, and help them make it an even better one. Your Canaccord advisor can help your family reach those coordinates.

About Canaccord Genuity Wealth Management

Canaccord Genuity Wealth Management is a premier global wealth management firm. We focus on helping successful families reach the coordinates that define their life goals. To achieve this, we search the globe for investment opportunities, and deliver targeted long-term and near-term investment strategies for clients in Canada, Australia, the U.K. and Europe. To us there are no foreign markets.™

Canaccord advisors are entrusted with more than \$25 billion* in assets under administration and management. With access to the Complete Canaccord full range of investment options and financial, estate and insurance planning services**, our advisors are committed to providing clients with a broad array of solutions to simplify their busy lives and realize their desired investment outcomes.

canaccord.com/ca



* Administered and managed by Canaccord Genuity Wealth Management in Canada and affiliated operating companies of the Canaccord Genuity group worldwide.

** Insurance and estate planning services are offered by Canaccord Genuity Wealth & Estate Planning Services Ltd.

Safeguarding your investments

Our commitment is to understand and exceed the expectations of our clients. The safeguarding of your investments will always be our top consideration.

Canaccord Genuity Group Inc. is a participant organization with the **Canadian Depository for Securities (CDS)**. CDS is Canada's national securities depository, clearing and settlement hub. CDS is accountable for the safe custody and movement of equity, fixed-income and money market securities, accurate record keeping, the processing of post-trade transactions, and the collection and distribution of entitlements relating to the securities that have been deposited by participants. CDS is regulated by the Ontario and Quebec securities commissions and the Bank of Canada, with working and reporting relationships with the Canadian Securities Administrators (CSA), other provincial securities commissions and the Office of the Superintendent of Financial Institutions. For more information, please visit cds.ca.

Client accounts with Canaccord Genuity Wealth Management are protected through additional agencies including the **Investment Industry Regulatory Organization of Canada (IIROC)** and the **Canadian Investor Protection Fund (CIPF)**. * While no investment strategy offers complete protection from changing market values or investment product performance, the CIPF protects investors from losses due to insolvency of a CIPF member. For more information, please visit cipf.ca.

Life insurance solutions purchased through Canaccord Genuity Wealth & Estate Planning Services Ltd. are protected through **Assuris**. Please visit assuris.ca for more information.



N 43° 38' 49"
W 79° 22' 43"

CANACCORD GENUITY WEALTH MANAGEMENT, CANADA

Leverage the informed perspective and resources of Canada's largest global, independent wealth manager.

Our values

Canaccord advisors are driven by core company values and recognize that building lasting relationships is key to delivering results to our clients and community.

We put our clients first.

We develop deep trust with our clients through detailed consultation, appropriate investment ideas and value-added services.

A good reputation is our most valued currency.

Integrity and respect for client confidentiality are the basis of all our relationships.

Ideas are the engine of our business.

Our originality in the generation of quality ideas positions us ahead of the competition globally.

We are an entrepreneurial, hard-working culture.

We believe that highly qualified, motivated professionals working together in an entrepreneurial environment results in superior client service and shareholder value.

We strive for client intimacy.

The more detailed our understanding of our clients' needs and objectives, the better positioned we are to meet them.

We are dedicated to creating exemplary shareholder value.

We are committed to aligning the interests of our people with fellow Canaccord shareholders through share ownership. We believe that ownership motivates the ideas and efforts that lead to value creation.

To us there are no foreign markets.™

Our clients benefit from our truly global perspective. We deliver insightful, actionable ideas from both local and international markets through our continued pursuit and evaluation of global opportunities.

About Canaccord Genuity Group Inc.

Through its principal subsidiaries, Canaccord Genuity Group Inc. (the “Company”) is a leading independent, full-service financial services firm, with operations in two principal segments of the securities industry: wealth management and capital markets. Since its establishment in 1950, the Company has been driven by an unwavering commitment to building 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. The Company has offices in 11 countries worldwide, including wealth management offices located in Canada, Australia, the U.K. and Europe. Canaccord Genuity, the international capital markets division, operates in Canada, the U.S., the U.K., France, Germany, Ireland, Hong Kong, mainland China, Singapore, Australia and Barbados. To us there are no foreign markets.™

Canaccord Genuity Group Inc. is publicly traded under the symbol CF on the TSX and the symbol CF. on the London Stock Exchange.

canaccordgenuity.com

Australia

Canada

China

France

Germany

Guernsey

Ireland

Isle of Man

Jersey

Singapore

United States

United Kingdom

Canaccord Genuity Wealth Management is a division of Canaccord Genuity Corp.
Member – Canadian Investor Protection Fund

Member of all Canadian stock exchanges and the Investment Industry Regulatory Organization of Canada

The company of the Canaccord Genuity group of companies through which products and services are offered may differ by location and service. See canaccordgenuitygroup.com/en/companies for more information.

CGWM-BR001-10K