



**Private Wealth
Management**

Our Investment Solutions

A variety of high-performance,
personalized and sophisticated solutions
to help you achieve your financial goals.



At fdp Private Wealth Management, our team of strategists leverages all its expertise to develop investment solutions that meet your requirements and evolve with your needs and assets.

fdp Selection ETF Portfolio

ETFs are investment products that are very popular because of their simplicity, their flexibility and their affordability, and they can help to set up a wealth accumulation plan to achieve certain financial goals. They are primarily for investors who are in the **wealth-building phase** of their **financial journey**.

The **fdp Selection ETF Portfolio** offers you the opportunity to invest in a carefully calculated preselection of **passively managed index ETFs**, selected by our investment team from the multitude of ETFs available on the market.

These ETFs have been selected for their **quality** and their **ability to closely replicate their benchmark index**. They can give you exposure to a specific market, region, or asset class as part of your **portfolio diversification**.

fdp Private Mandate

Reserved for our high-net-worth clients and their families, for whom personalized **discretionary management** of their investments and securities is recommended, the fdp Private Mandate includes **integrated management** of your portfolio to optimize financial and tax considerations.

- ◆ Its approach combines a **strategic framework** with **tactical management** of your assets.
- ◆ You have direct access to an **experienced portfolio manager**.
- ◆ Our **corporate asset allocation committee** is responsible for **tactical moves**, designed to **protect** your capital and **take advantage** of market opportunities.
- ◆ The fdp Private Mandate combines a **rigorous investment process** with a **clearly defined investment policy**, to ensure **constant transparency** in the management of your assets.
- ◆ It also requires **specialized know-how** and **financial instruments**.
- ◆ You benefit from **sliding-scale fees**, as do your loved ones thanks to our **family pricing**.

fdp Perspective Private Portfolio

A **flexible** investment solution available in a variety of combinations:

- ◆ **Strategic allocation** of your assets, precisely aligned with your objectives and your investor profile.
- ◆ With asset classes and management styles that provide you with **optimal investment prospects**.
- ◆ With investment products managed according to our investment philosophy by **world-class asset managers**.
- ◆ With **competitive fees**.
- ◆ With the possibility of adding **optionalities** to your investment choices.

What are the optionalities?

They allow you to invest in certain **global market trends** by adding them to your portfolio and contribute to its **customization** and **diversification**.



Environment optionality

Various sectors developing responsible and sustainable practices to protect the environment.



Technologies of the Future optionality

High-performance, innovative technologies to optimize global economies.



Health and Medical Innovations optionality

Companies involved in the research, development and production of healthcare products or services.



Residential Real Estate optionality

Focused on the Canadian rental sector, which is geographically diversified and supported by demographic growth.



Tactical Asset Allocation optionality

Short-term asset class, geographic allocation or risk factor strategies.



Our range of mutual funds

Our investment offer also includes a **range of diversified** fixed-income and equity **mutual funds** that are managed, depending on the fund, either by our internal managers or by world-renowned external managers.

We also offer a selection of **responsible investment** funds, which contribute to the development of innovative and sustainable solutions in various industries.

fdp Private Management has affirmed its position on ESG considerations by becoming an official signatory of the **United Nations Principles for Responsible Investment** in 2022.

Contact us to learn more.

fdpgp.ca

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