

Our investment solutions

Our goal: to excel for our clients.

All our solutions are designed with a view to performance, personalization and sophistication. Flexible investment that evolve based on your assets, as well as your goals and interests.

	fdp Select ETF Portfolio	fdp Mutual Fund Portfolio	fdp Perspective Private Portfolio	fdp Private Mandate
Minimum required	Initial minimum of \$5,000	Initial minimum of \$2,500 + Initial investment of \$1,000 per fund	\$250,000 for the household ¹ + Minimum of \$100,000 held by a household member	\$1.8 million for the household ¹ + \$200,000 in government and/or municipal bonds to be eligible for bond securities \$200,000 in Canadian stocks to be eligible for Canadian equity securities
Investment products	ETF	fdp mutual funds Series A3 ²	fdp mutual funds Series I ³ ETFs	Stocks Fixed-income securities fdp mutual funds Series I ³ ETFs
Type of management	Passive	Active	Active	Discretionary
Fees	Competitive pricing	Competitive pricing	Sliding fee scale based on household assets under management	Sliding scale based on household assets under management + Administrative fees per buy or sell transaction ⁴

1 A household includes the client, the spouse, children under the age of 18, children age 18 to 25 for whom the client has a power of attorney, regardless of the domicile address, and sole proprietorships. All trusts are eligible. The Financial also offers family pricing. To learn the terms and conditions, contact your advisor. 2 With prospectus. 3 Without prospectus. 4 Administration fees \$12 (+ taxes) per buy or sell transaction. Commissions, trailing commissions, management fees and expenses all may be associated with investments. Please read the prospectus before investing. The indicated rates of return are the historical annual compounded total returns, including changes in portfolio value and reinvestment of all distributions, but do not take into account sales, redemption, distribution or optional charges or income taxes payable by an investor that would have reduced returns. The Funds' securities are not insured by the Canada Deposit Insurance Corporation. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. The approaches are subject to change without notice.