

## INVESTMENT PLANNING COUNSEL INC.

Investment Planning Counsel is an integrated financial services company focused on providing Canadians with high-quality financial products, services, and advice, while helping them achieve their financial dreams. Investment Planning Counsel is dedicated to providing independent financial planners with the tools, products, and support they need to build a better business.

Investment Planning Counsel is one of the largest financial planning organizations in Canada. From its inception in 1996 through 2009, it has continued to evolve and adapt to meet the needs and expectations of its clients and advisors.

### HIGHLIGHTS

- In 2009, Investment Planning Counsel saw assets under administration increase from \$10.3 billion to \$12.4 billion, an increase of 19.5%.
- Assets under management in the Counsel Funds increased from \$1.7 billion to \$2.1 billion in 2009, an increase of 23.0%.
- Investment Planning Counsel partners with over 650 advisors across the country and continues to attract advisors into its business model.

### STRENGTH IN PARTNERSHIP

The relationship between IGM Financial and Investment Planning Counsel provides a solid foundation for growth and excellence. The scale,

strength, and expertise of IGM Financial allows Investment Planning Counsel to improve operational efficiencies in various processes such as compliance and back-office infrastructure. The relationship enables the company to provide its advisors with a strong and stable operating environment, thereby allowing them to build a better business, while providing enhanced client service.

In addition to investment management solutions, advisors have access to a suite of insurance, securities, and mortgage products. The broad product offering gives advisors a range of financial products to service their clients' evolving needs.

### BUILDING FOR THE FUTURE

Investment Planning Counsel continues to improve its product and service offering for advisors and clients. With ongoing improvements to its business fundamentals, Investment Planning Counsel will continue to deliver value to advisors and clients, while building its reputation as a leading network of advisors.