



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 2011, it has continued to evolve and adapt to meet the needs and expectations of its clients and advisors.

HIGHLIGHTS

- Investment Planning Counsel partners with over 850 advisors across the country and continues to attract advisors into its business model.
- Assets under management in the Counsel Funds increased from \$2.7 billion to \$2.8 billion in 2011, an increase of 4.6%.
- In 2011, Investment Planning Counsel saw assets under administration decrease from \$17.4 billion to \$16.5 billion, a decrease of 5.1%.

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.

CORPORATE SOCIAL RESPONSIBILITY

Investment Planning Counsel is committed to supporting communities in the areas where we operate. The firm practices a culture of "Giving Back to Society", supporting numerous local and national charities, events and organizations through our advisor and employee volunteering programs. Our Spirit Committee spearheads the firm's charitable giving initiatives. The group of employee volunteers coordinates fundraising activities, promotes employee volunteering, and reviews requests for donations throughout the year. We are a major supporter of Junior Achievement Canada and our advisors and employees volunteer their time and energy to provide financial literacy education to the youth in our communities. Our "Go Green Committee" is committed to reducing our environmental footprint and has implemented a number of initiatives that aim to reduce the amount of paper we consume each year.

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.