Investment Planning Counsel™
FINANCIAL SOLUTIONS FOR LIFE

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. We are dedicated to providing independent financial advisors 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. Since our inception in 1996, we have continued to evolve and adapt to meet the needs and expectations of our clients and advisors.

HIGHLIGHTS

- Investment Planning Counsel partners with over 900 advisors across the country and we continue to attract advisors into our business model.
- In August, the acquisition of Independent Planning Group was announced, with over 200 financial advisors, $2.2 billion in assets under administration and $44.8 million in mutual fund assets under management.
- Assets under management in Counsel Portfolio Services increased from $2.9 billion to $3.4 billion in 2013, an increase of 15.5%.
- In 2013, Investment Planning Counsel's assets under administration were $21.2 billion, compared to $16.1 billion the previous year, an increase of 31.3%.

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. This relationship enables us to provide our 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. We practice 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 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 our product and service offering for advisors and clients. With ongoing improvements to our business fundamentals, we will continue to deliver value to advisors and clients, while building our reputation as a leading network of advisors.