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**PRIVATE**

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**WEALTH**

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**POOLS**

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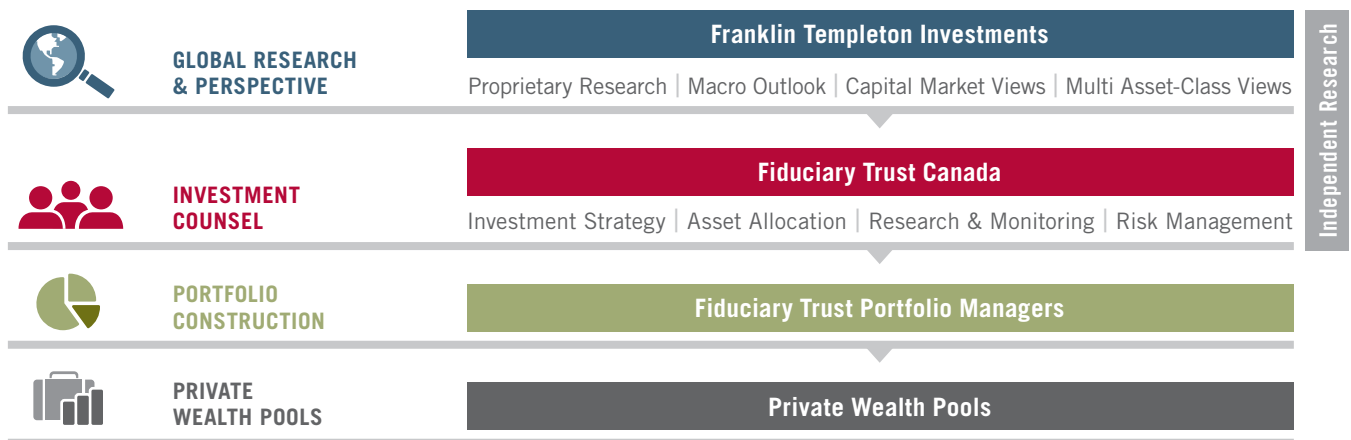
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A WEALTH OF EXPERIENCE  
AN EXCLUSIVE OPPORTUNITY  
A PARTNERSHIP YOU CAN TRUST

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# A Wealth of Experience

Fiduciary Trust has been successfully providing customized wealth management solutions to affluent Canadians for over 30 years. We are investment counselors and trust experts who help clients preserve, grow and transfer their wealth. A trusted and proven private wealth boutique, backed by the global strength of Franklin Templeton Investments, affords client's access to best in class portfolio managers and the exclusive investment opportunities of a global investment leader.



## Investment Strategy

Our goal is to deliver superior after-tax, risk-adjusted returns. To do this, we offer specialized expertise across key investment styles and asset classes, supported by the resources of one of the world's largest and most trusted global investment managers, Franklin Templeton Investments.

Investment decisions draw on the collective input and expertise of the entire investment team. We conduct regular manager reviews and assess each portfolio's characteristics, including asset class weightings, sector allocations and securities holdings. This approach ensures continuity and discipline.

## Research & Monitoring

We leverage the extensive global resources and capabilities of Franklin Templeton, including global macro-economic insights and deep analytics on thousands of companies. Our collaborative culture fosters cross-organizational idea sharing, enabling us to apply our firm-wide strategic insights and broad equity research resources into our investment process and your portfolio.

We rebalance regularly to ensure the portfolio exhibits the qualities we find desirable.

## Risk Management

Our investment management process includes disciplined risk management and due diligence—seeking to ensure that risks are recognized and rational, and have the potential to be rewarded. Our investment management team uses sophisticated modeling tools to analyze each portfolio's metrics and responsiveness to various market environments and hypothetical events. In addition, the global risk management team of Franklin Templeton conducts daily risk monitoring to ensure that risk remains in line with short- and long-term views.

# An Exclusive Opportunity

The New Private Wealth Pools feature three exclusive investment portfolios offering strategic asset allocation based on long-term capital market expectations, but with tactical adjustments to adapt to market outlook and conditions. Leveraging the 30 plus years of Fiduciary Trust’s proven wealth management expertise, these pools have been designed specifically for private wealth investors.

## Key Features

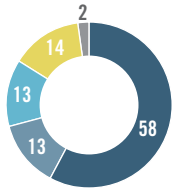
- Access to Fiduciary Trust Canada’s proven expertise in managing wealth for affluent families and foundations.
- Preferred pricing—competitive fees that continue to reduce as the investment grows
- Active Management—portfolios are constructed using a combination of securities and other investment vehicles. They are consistently monitored and adjusted to achieve the optimal blend of asset classes, investment styles, geographic regions and market capitalizations.
- A focus on risk management and risk adjusted returns
- Timely market commentary from our investment team, which includes insights on the current state of global markets.

## Private Wealth Pools

Neutral Weight (%)

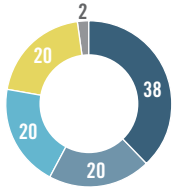
### FT BALANCED INCOME

Stability and tax effective income generation. This will be achieved mostly through participation in fixed income markets.



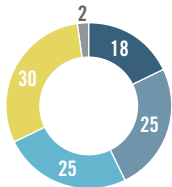
### FT BALANCED GROWTH

A balance of current income and long-term capital appreciation by investing in a diversified mix of equity and income markets.



### FT GROWTH

Long-term capital appreciation through participation primarily in diversified global equity markets.



- Fixed Income
- Canadian Equities
- U.S. Equities
- International Equities
- Cash

# A Partnership You Can Trust

Fiduciary Trust offers a unique combination of personalized service and global perspective for every individual client, combined with the resources, strength and expertise of a leading global investment manager.

Speak to your financial advisor to learn more about Fiduciary Trust Canada's Private Wealth Pools, visit [www.franklintempleton.ca/privatewealthpools](http://www.franklintempleton.ca/privatewealthpools) or contact us directly to discuss your wealth management needs.

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[fiduciarytrust.ca](http://fiduciarytrust.ca)

**FIDUCIARY TRUST COMPANY OF CANADA** and its predecessors have specialized in investment management for individuals and families since 1982. A federal trust company license enables Fiduciary Trust to act as executor and trustee, thereby allowing it to provide continuity of wealth management through multiple generations. As part of the Franklin Templeton group of companies, Fiduciary Trust has direct access to the worldwide investment expertise of Franklin Templeton Investments. These global resources enable Fiduciary Trust to design wealth management solutions which are unique to each client. Fiduciary Trust offers the following services in Canada:

- Investment Management
- Investment Funds\*
- Estate Administration
- Trust Administration

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated.

Fiduciary Trust Canada is a business name used by Fiduciary Trust Company of Canada. Fiduciary Trust Company of Canada is an indirect wholly owned subsidiary of Franklin Resources, Inc., a global investment organization operating as Franklin Templeton Investments.

\*Investment funds are offered through Fiduciary Trust Company of Canada's wholly owned subsidiary FTC Investor Services Inc.