



**PROSPERITY**  
MANAGED INVESTMENT PLATFORM

**BOLD.  
BALANCED.  
BEST OF BREED.**

# DIVERSIFY YOUR PORTFOLIO WITH T.E. WEALTH'S STRATEGIC MULTI-MANAGER SOLUTION

The Prosperity Managed Investment Platform is a proprietary T.E. Wealth investment offering managed by T.E. Investment Counsel (TEIC) that combines all of the elements of sophisticated portfolio management into a solution designed to both protect and grow your capital over time.

Prosperity Pooled Funds give clients access to meticulously selected, top-tier institutional managers within each asset class. Rigorous analysis ensures adequate diversification so as to navigate different market cycles while mitigating risk.



## A complementary, multi-manager approach

Building a multi-manager investment platform that produces solid results able to withstand sometimes volatile market conditions requires sound thinking, objectivity, uncompromising investment standards and a team of dedicated and experienced investment professionals.

TEIC adheres to a continual process to select investment managers; we apply an in-depth analysis and evaluation process to identify, understand and monitor best-of-breed active investment managers, company procedures, portfolio construction methodologies and performance.



## OUR DILIGENT WORK ENABLES OUR CLIENTS TO BENEFIT FROM:

- Access to top-tier investment managers often available only to institutional clients
- Knowledge that managers were objectively selected by way of an exhaustive search and due diligence process
- Regular reviews and ongoing monitoring of managers
- Lower investment management fees than many similar programs

### Access a world of opportunities within each fund

TEIC blends the complementary styles of carefully chosen investment managers into portfolios designed to deliver a balance of capital protection and appreciation.

Each Prosperity pooled fund has a specific asset class focus. TEIC clients may invest in:

- Prosperity Canadian Fixed Income Fund
- Prosperity Canadian Equity Fund
- Prosperity US Equity Fund
- Prosperity International Equity Fund

## Ongoing platform management with qualitative and quantitative evaluations

Continual monitoring and rebalancing is pivotal to every fund's success. Our research is ongoing and conducted simultaneously, in several ways:

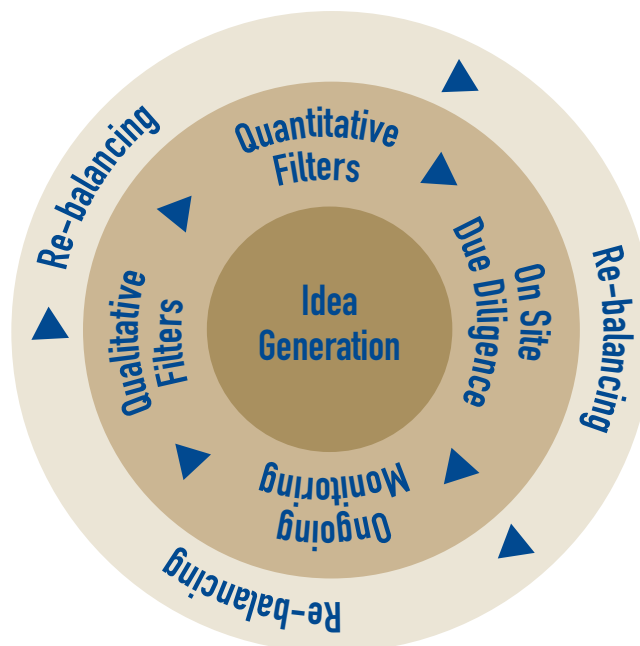
**Rigorous assessment of our pool of investment managers** ensures that we understand the source of their added value, their management style and the risks embedded in their portfolios. Qualitative and quantitative analysis are used to determine whether performance is deviating from the manager's style and stated objectives, and managers are met with on a quarterly basis to review results and any updates of note about the firm, the team or the strategy.

**Onsite due diligence visits** enable TEIC to assess a given organization's strengths. In depth face-to-face meetings with key investment professionals are an integral part of our process as we review investment approaches and risk controls. We want to assess company stability, understand their long-term business plan and see evidence of growth in their assets.

**Quantitative filters identify high-performance managers** who have consistently delivered attractive, risk-adjusted returns. We focus on a number of key metrics such as added value, volatility of returns, tracking error relative to market activity, information ratio and active share. We also examine whether a portfolio is dominated by a single sector, and what risk controls are in place to limit the exposure to that market segment.

**Qualitative filters assess the company behind the investment manager.** These filters identify organizational issues, high key staff turnover, how research is conducted, how rigorous the investment process is, and who ultimately makes the buy/sell decisions. Succession plans, compensation structures and whether there is adequate personnel to support business growth are also considered.

### PROSPERITY PLATFORM MANAGEMENT





Ready to take your investment strategy to the next level? Talk to us.

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**T · E · W E A L T H**  
T.E. INVESTMENT COUNSEL

Your life. Your legacy.

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[www.teic.com](http://www.teic.com) • 1-888-505-8608

To learn more about the Prosperity Managed Investment Platform, please contact us: [www.tewealth.com](http://www.tewealth.com) • 1-888-505-8608

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