

Counsel Launches Two New Pools Aimed at Mass Affluent Investors; Adds Leading Money Managers to Roster

Toronto (November 2, 2023): Counsel Portfolio Services (Counsel) today announced the launch of two new investment solutions under its IPC Private Wealth Visio Pools offering.

Designed specifically for mass affluent investors, the asset allocation structure for the new pools - **IPC Private Wealth Visio Global Advantage Balanced Pool and IPC Private Wealth Visio Global Opportunities Balanced Pool** – features a concentrated selection of global equities representing the ‘best ideas’ of each Pool’s equity manager. Rounding out its asset allocation are a laddered bond strategy for income and stability, and selected ETFs for added diversification.

“The asset allocation for IPC Private Wealth Visio Pools replicates a strategy often used by the ultra-wealthy, said Sam Febraro, President & CEO, Counsel Portfolio Services. “By combining a concentrated high-conviction equity mandate with laddered bonds and ETFs, we can provide our investors with a similar strategy in a single-ticket portfolio that is easy to explain,” he added. Mawer Investment Management will manage the global equity mandate for IPC Private Wealth Visio Global Advantage Balanced Pool, and EdgePoint Wealth Management will manage the global equity mandate for IPC Private Wealth Visio Global Opportunities Balanced Pool.

“With Mawer and EdgePoint, advisors will have access to two of the country’s leading equity money managers, each with compelling investment philosophies and proven long-term track records of success,” explained Blair Setford, VP Product Management, Counsel Portfolio Services.

Both pooled solutions will be available on or about November 6, 2023.

Brown Advisory to Sub-Advise New Counsel U.S Growth Equity Component

In tandem, Counsel is launching Counsel U.S. Growth Equity, a new component fund that will be available on a standalone basis and be an underlying fund for Counsel’s turnkey portfolios. It will be sub-advised by Baltimore-based Brown Advisory. Brown’s unique investment approach seeks to identify durable businesses that have a combination of fundamental strength, sustainable competitive advantages, and compelling valuation.

“The addition of Brown and EdgePoint, alongside Mawer – a long-standing sub-advisor for Counsel – gives our advisors access to a deep roster of independent investment specialists,” said Mr. Setford. “Counsel today has 17 third-party money managers, each of whom is carefully selected based on in-depth research, and continuously monitored by our Portfolio Management team to ensure that each money manager is ideal for the strategy they manage,” Mr. Setford summed up.

Counsel U.S. Growth Equity will be an underlying fund in the following turnkey portfolios:

- IPC Private Wealth Visio Balanced Growth Pool
- Counsel All Equity Portfolio
- Counsel Growth Portfolio
- Counsel Balanced Portfolio
- Counsel Conservative Portfolio
- IPC Focus Conservative Portfolio
- IPC Focus Balanced Portfolio

- IPC Focus Growth Portfolio
- IPC Focus Equity Portfolio

Investors who hold any of these portfolios will automatically gain exposure to the new mandate on or about November 6, 2023.

About Counsel Portfolio Services Inc. Counsel is a subsidiary of Investment Planning Counsel Inc. (IPC Inc.). With \$4.3 billion in assets under management as at October 31, 2023, Counsel provides comprehensive, objective portfolio solutions utilizing the strength and expertise of third-party portfolio managers. Counsel, through IPC Inc., is a member of the IGM Financial Inc. (TSX: IGM) group of companies. IGM Financial is one of Canada's premier financial services companies.

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