CIBC Wood Gundy

The Meyer Financial Group

Advisor Managed Account

A PREMIUM PORTFOLIO SERVICE

Advisor Managed Account (AMA) is a premium; fully managed discretionary account[1] personally serviced by your Investment Advisor who is a qualified CIBC Wood Gundy Portfolio Manager.

In a managed account, the most important contributing factor to performance is your Portfolio Manager. CIBC Wood Gundy Portfolio Managers must hold specific industry credentials and maintain stringent CIBC Wood Gundy qualifications. The firm stands behind our services, conducting ongoing monitoring of each Portfolio Manager to ensure they provide nothing but the highest quality of service to every client. You can rest assured your investments are in good hands.

Putting Your Objectives First

Since AMA is a personalized service, we go to great lengths to understand your background and investment objectives. The result is a detailed Investment Policy Statement, a key component of the AMA program. Your Investment Policy Statement is a thorough report that details your background, investment objectives, risk tolerance, and the guidelines used to manage your portfolio.

One Fee For Service

Paying one Annual Fee (monthly or quarterly) means predictability, transparency and unlimited service for your Advisor Managed Accounts.

A Wide Selection Of Investment Options

AMA provides your CIBC Wood Gundy Portfolio Manager with the flexibility to incorporate a range of security types in their investment strategies. This allows you to place reasonable constraints on the securities you hold, depending on your existing portfolio or social or moral beliefs and risk tolerance.

Online Account Access And Research Tools

Through the secure, password-protected area of our website, www.cibcwoodgundy.com, you can access your AMA information and statements – anytime, from anywhere you have access to the Internet. Through this secure site, you also have access to a full spectrum of top-ranked research.

Features At A Glance

- Professional Portfolio Management services from your CIBC Wood Gundy Investment Advisor
- No additional trading costs for Advisor Managed Accounts
- Monthly or quarterly asset-based fee, billed in arrears
- Preferred interest rates on cash balances and margin loans
- No fees for up to 15 enrolled, registered accounts per household[2]
- Detailed account statements and online account updates
- Annual Fee Summary statement to assist with tax filing

For more information on Advisor Managed Account, speak to your CIBC Wood Gundy Investment Advisor or visit us at www.cibcwoodgundy.com.

1 Minimum account balance of $100,000 per household.

2 A minimum monthly interest accrual may apply for credit to account.