PORTFOLIO PARTNER

INVESTING IS MORE THAN JUST A SERIES OF TRANSACTIONS. IT'S ABOUT BUILDING THE FUTURE YOU'VE DREAMED OF.

Designed to develop an enhanced relationship with your CIBC Wood Gundy Investment Advisor, Portfolio Partner connects you with a professional to receive personalized advice on investment decisions and portfolio construction.

Why choose Portfolio Partner?

Portfolio Partner places you and your Investment Advisor on the same side of the table, sharing the same goal — to see your assets grow. This premium portfolio service allows you to work closely with your CIBC Wood Gundy Investment Advisor to implement a tailored investment strategy to manage your portfolios on an ongoing basis.

Professional Investment Advice

Leverage the experience, strategies, and advice of your CIBC Wood Gundy Investment Advisor. This relationship will allow you to invest, manage and save your money more effectively than ever before.

Value

Your CIBC Wood Gundy Investment Advisor offers a range of value-added services that are included in your Portfolio Partner annual fee. From professional investment advice and one-on-one meetings and access to insightful research, Portfolio Partner is more than just an account – it is an all-inclusive investment service designed to help you achieve your financial goals.

Commission Free Trading

Paying an annual fee, either monthly or quarterly, instead of commissions on every transaction, grants you the freedom to pursue your investment strategy without being concerned with individual transaction costs. One fee means predictability, transparency and unlimited service, allowing you to make changes to your investments when opportunities arise. Portfolio Partner puts you in control of all investment decisions with a wide range of choice.

Complimentary Cash Management

Portfolio Partner waives the annual administration fee for one Asset Advantage Account per household. Asset Advantage Accounts offer both investment and banking privileges, including chequing, pre-authorized bill payment and access to CIBC credit cards, among many other benefits.

No Annual Administration Fee For Enrolled Registered Accounts

Take advantage of Portfolio Partner's unique pricing structure to free you from annual account administration fees for registered accounts, such as a Registered Retirement Savings Plan (RRSP), Registered Retirement Income Fund (RRIF), Tax-Free Savings Account (TFSA) or Registered Education Savings Plan (RESP).

A Wide Selection Of Investment Options

Portfolio Partner enables you to carry out your investment strategy by investing your money in any security available through CIBC Wood Gundy.

PORTFOLIO PARTNER KEY BENEFITS

- Professional investment advice from your CIBC Wood Gundy Investment Advisor
- Monthly or Quarterly fees based on total assets
- Commission-free trading – entitling you to a generous number of commission-free trades each year
- A wide selection of investment options
- Waived annual administration fee on enrolled registered accounts
- Waived administration fee for one Asset Advantage Account
- Detailed account statements and online access to account updates
- Renowned investment, corporate and industry research
- Ability to consolidate related accounts into a household, allowing you to benefit from declining fee rates and, at certain asset thresholds, increased trade allotments

One fee to reach your ultimate financial goal.

Unlimited choice to get you there.

That's Portfolio Partner.

For more information on Portfolio Partner, please speak with your CIBC Wood Gundy Investment Advisor.

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