axiom®

PORTFOLIOS

Specialized
Investment
Expertise

Complexity is the new normal

With increasing complexity in today's financial landscape, you need to be sure that your investment portfolio is built for protection and wealth enhancement. Is your portfolio equipped with the right investment expertise?

Have you hired the best specialists?

How do you ensure that your investments are strategically tailored and positioned to benefit from the knowledge and experience of some of the best investment experts?

Select the right team for the job. Accessing and selecting best-in-class investment managers and monitoring their performance is critical. How these managers come together and complement each other in your portfolio is just as important.

THE SPECIALIST MODEL:

Doesn't your portfolio deserve the same treatment?

Your family doctor might have a broad understanding of basic ailments, but for more specific or complex conditions, you're likely referred to one or more specialists. For instance, heart surgery would likely require you to see a cardiologist, an anesthesiologist, a cardiothoracic surgeon, as well as a physiotherapist for post-operative care and rehabilitation. You couldn't get all this from your general practitioner.

Our open architecture philosophy

Axiom Portfolios are constructed from underlying investment pools built on our philosophy of an open architecture investment manager platform and a specialist model.

While most investment firms have specific areas of expertise, our open architecture allows us to bring together some of the highest-calibre independent and specialized experts from around the world.

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Hand-picked global investment management firms

Our platform allows us to diversify risk and fill very specific roles with some of the best managers across asset classes, geographic regions and investment styles.

You can be assured of the knowledge and expertise managing each element of your portfolio. These investment managers are strategically combined to help you meet your portfolio objectives.

To select the best, you have to meet the rest

Our Investment Management Research (IMR) team looks to create value for your portfolio through the relentless pursuit of skilled investment managers from around the globe. The team identifies skilled managers by using a comprehensive proprietary process to evaluate managers.

A key element of this process is the understanding of how an investment manager's portfolio characteristics produced by their investment style are rewarded in different market conditions. This enables IMR to evaluate a manager more specifically on their investment skill.

Selecting and combining investment managers with complementary styles allows for better diversification and the potential of a more consistent long-term pattern of outperformance.

IMR Research Process

IDENTIFY
STEP 01

- Analyze managers based on key investment style factors

UNDERSTAND
STEP 02

- Research manager skill and executional capabilities focused on specific categories

RANK
STEP 03

- Evaluate and rank each manager according to best practice standards

Axiom Portfolios offer the wisdom of proven portfolio managers from around the globe, each with specialized investment expertise.

AllianceBernstein Canada, Inc. (AB)

Alliance Capital acquired Sanford C. Bernstein in October 2000 to form AllianceBernstein. AllianceBernstein Canada Inc. (AB) is a subsidiary of AllianceBernstein L.P. AB offers a comprehensive range of research, portfolio management, and wealth management services. Headquartered in New York, it has offices in 46 locations in 22 countries. With offices around the world, it can leverage global capabilities to meet the needs of its clients.

Barrantagh Investment Management Inc. (BARRANTAGH)

Barrantagh, established 1995, provides disciplined portfolio management to individual and institutional investors. The firm is committed to a high level of client service provided directly by its experienced partners. It is dedicated to preserving clients' capital while generating growth through consistent application of the firm's value-based fundamental investment philosophy. This approach has delivered above-average investment returns while incurring below-average levels of investment risk.

Brandywine Global Investment Management, LLC (BRANDYWINE GLOBAL)

Brandywine Global Investment Management, LLC (Brandywine) is a Specialist Investment Manager of Franklin Resources, Inc. Acting with conviction and discipline, Brandywine Global looks beyond short-term, conventional thinking to rigorously pursue long-term value. Since 1986, the firm has provided a range of differentiated fixed income, equity, and alternative solutions to both institutional and retail clients. The Global Fixed Income team manages an extensive suite of active, value-based global bond strategies.

Canso Investment Counsel Ltd. (CANSO)

Since its inception in 1997, Canso has been solely dedicated to managing corporate bonds. Canso's investment team is comprised of portfolio managers and credit analysts, who have demonstrated a solid track record for corporate bond mandates. Canso focuses on the fundamental analysis and security selection of corporate bonds and focuses on buying out-of-favour and undervalued bonds. The result is diversified, well-structured portfolios of corporate bonds with a credit range including all investment-grade bonds and some allocation to below-investment-grade issues.

Causeway Capital Management LLC (CAUSEWAY)

Founded in 2001, Causeway is an investment firm wholly-owned by its employees, based in Los Angeles, California. Causeway manages assets in global, international, emerging market and absolute return equities for a variety of clients. The firm's strategy focuses on active investment management with a bottom-up approach to stock selection.

CIBC Asset Management (CAM)

CAM is one of Canada's leading investment managers with one of Canada's broadest platforms. CAM's investment philosophy centres around providing clients with strong added value that corresponds to their risk/return profile. CAM believes in depth of research, coordination and teamwork between groups to achieve this. As an innovator in developing new portfolio solutions that correspond to and anticipate changing client needs, CAM offers a broad product range, spanning many asset classes.

CIBC Private Wealth Advisors, Inc. (PRIVATE WEALTH ADVISORS)

CIBC Private Wealth Advisors, Inc. (formerly, CIBC Atlantic Trust Private Wealth Management) delivers personalized, integrated and objective wealth management solutions for affluent individuals and multi-generational families, as well as foundations and endowments. Across the U.S., our experienced professionals strive to provide the highest-quality client service with strong investment performance and a fiduciary mindset.

Connor, Clark & Lunn Investment Management Ltd. (CC&L)

Established in 1982, CC&L is one of Canada's leading money management firms dedicated to managing assets for pension fund sponsors, capital accumulation plans, corporations, not-for-profit organizations, mutual funds and individual investors. CC&L is wholly owned by its partners and the CC&L Financial Group. CC&L's core approach seeks to exploit the opportunities that arise when its fundamental expectations vary significantly from consensus expectations. Macroeconomic analysis is used to influence sector and capitalization positioning, combined with detailed bottom-up fundamental analysis. CC&L's investment approach is designed to add value across all market conditions.

Guardian Capital LP (GUARDIAN)

Guardian is an independent, diversified financial services firm providing investment solutions to institutional and retail investors. Guardian was incorporated in 1962 and has been a public company listed on the Toronto Stock Exchange since 1969 (management holds in excess of 50 percent of the shares). Guardian manages equity and fixed income mandates both globally and domestically.

Harding Loevner, LP (HARDING LOEVNER)

Harding Loevner was established in 1989 by former global investment managers for the Rockefeller family, with the goal of managing equity portfolios using a genuinely global research perspective. It offers five equity strategies – Global Equity, International Equity, Emerging Markets Equity, Frontier Emerging Markets Equity, and International Small Companies. The firm serves a global client base from its office in Bridgewater, New Jersey.

Morgan Stanley Investment Management Inc. (MSIM)

Morgan Stanley Investment Management Inc. (MSIM) is a client-centric organization dedicated to providing investment and risk-management solutions to a wide range of investors and institutions, including corporations, pension plans, intermediaries, sovereign wealth funds, central banks, endowments and foundations, governments and consultant partners worldwide. With over four decades of asset management experience, our investment strategies span the risk/return spectrum across geographies, investment styles and asset classes, including equity, fixed income, alternatives and private markets. MSIM offers its clients personalized attention, the intelligence and creativity of some of the brightest professionals in the industry, and access to the global resources of Morgan Stanley.

Pzena Investment Management, LLC (PZENA)

Pzena Investment Management is an independent investment management firm that employs a classic value investment approach. The firm began managing assets on January 1, 1996 and manages assets for leading endowments, foundations, pension plans and individual investors. The firm is headquartered in New York City, with a representative office for Business Development and Client Services located in Melbourne, Australia.

Rothschild Asset Management Inc. (ROTHSCHILD)

Rothschild & Co is a global and family-controlled group, providing M&A, strategy and financing advice, as well as investment and wealth management solutions to large institutions, families, individuals and governments, worldwide.

Sophus Capital (SOPHUS)

Sophus Capital, a Victory Capital investment franchise, believes that emerging market equities reward growth and that an integrated, risk-managed approach can provide clients with a consistent return experience. The team is a diverse group of seasoned professionals, with a proven process that combines the best of analytical tools with fundamental research. Sophus Capital is located in Des Moines, Iowa, with research offices in London, Hong Kong and Singapore.

WCM Investment Management (WCM)

WCM is an independent, employee-owned asset management firm located in Laguna Beach. The principal owners of the firm are Paul Black, Kurt Winrich, Sloane Payne, Pete Hunkel, Mike Trigg, James Owens, and David Brewer. The remainder of the firm ownership is spread among other employees, providing all with a stake in the firm's success. WCM has worked hard to build and maintain an organization that nurtures excellence and innovation. To this end, WCM has kept head-count low, controlled asset growth, aligned employee incentives with clients' long-term goals, and vigorously protected its employee-owned status. WCM is a profitable, financially sound investment company with no debt.

WCM INVESTMENT MANAGEMENT

Wellington Management Canada LLC (WELLINGTON)

Wellington Management is an employee-owned private firm. Wellington's professionals operate within teams. Each focuses on specific investment approaches and conducts research within their own area of expertise, which is shared across teams. The firm covers global equity and fixed income markets and includes multi-strategy, specialty and alternative investment approaches, each with a well-articulated investment philosophy and process. The firm's most distinctive strength is its proprietary, independent research. Headquartered in Boston, Massachusetts, it has a global presence with offices located across North America, Europe, Asia and Australia.

WELLINGTON MANAGEMENT®

Choose from any of our 8 portfolio options:

- Axiom Balanced Income Portfolio
- Axiom Diversified Monthly Income Portfolio
- Axiom Balanced Growth Portfolio
- Axiom Long-Term Growth Portfolio
- Axiom Canadian Growth Portfolio
- Axiom Global Growth Portfolio
- Axiom Foreign Growth Portfolio
- Axiom All Equity Portfolio

Benefit from the advantages of open architecture. For more information on Axiom Portfolios and the knowledge and experience of its leading global investment specialists, call **1-888-888-3863** or visit **axiomportfolios.com**.

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