

Dear Veterans,

Our sincere congratulations on the success of a long legal battle. McInnes Cooper speaks proudly of its representation of you. As the conclusion of your settlement nears, you'll have to make some important decisions regarding how to best handle your settlement funds. There's no one right answer; your individual circumstances will vary greatly, and the answer will lie in your unique needs and goals.

At Assante Wealth Management we understand this and will work with you to provide solutions that address your complete financial well-being, encompassing everything from investments and insurance, to tax and estate planning needs. Supported by a team of professionals including lawyers, tax accountants and financial analysts, an Assante advisor can work with you to make the right decisions and help you gain peace of mind.

Assante provides a complete wealth planning solution that has the following attributes and benefits:

- Conservative and disciplined approach.
- Integration of tax planning, estate planning and risk management.
- Coordination among your existing professional advisors, where applicable.
- A focus on maximizing the after-tax return, including the use of a corporate class structure which provides for tax efficient investing.
- Integration of personal and business tax planning opportunities.
- Access to a personalized service team that understands your unique needs and circumstances.

Who we are

Founded in 1995, Assante Wealth Management has a long history of providing complete wealth management solutions to meet the needs and goals of Canadian families and businesses.

We are one of the country's largest wealth management firms with over 900 professional advisors located in communities throughout the country overseeing more than \$26 billion of assets under administration.

Assante Wealth Management is owned by CI Financial Corp., which is listed on the Toronto Stock Exchange, with its single largest shareholder, The Bank of Nova Scotia, owning approximately a 37% stake. The CI group of companies manages over \$100 billion of investment assets for individuals, corporations, pension plans and charitable foundations. We are very fortunate to share in the strength of this group, where we have access to a number of world-class money managers, as well as other key professional resources that assist us in delivering a complete wealth management solution to our clients.

McInnes Cooper

Our advisors and McInnes Cooper lawyers regularly collaborate for the mutual benefit of clients who require Assante's estate and tax planning strategies, and McInnes Cooper's legal skills to implement those strategies. Working with McInnes Cooper, we have coordinated a short list of advisors in your respective provinces to assist you in the administration of your financial settlement.

Please contact us at 1-888-808-5889, and one of our representatives will connect you with a local Assante advisor. Alternatively, you may submit a request through our online form, http://www.ci.com/web/onlineform/rs_130501.jsp?lang=EN

On behalf of everyone at Assante Wealth Management, we thank you for your service and look forward to working with you.

Be well-advised is our promise to you.

Sincerely,



Steve Donald
President
Assante Wealth Management

For more information about our services and approach please visit www.assante.com

Be informed, Be secure, Be well-advised

Questions you may have

What can I expect when I call?

One of our call center staff will ask you a few questions to help identify a local advisor to connect you with. Assante has over 900 professional advisors working in communities throughout the country.

What can I expect when I meet an Assante advisor?

At Assante we recognize that your needs are unique. That's why we've developed a complete approach to wealth management, encompassing everything from your investments and insurance to your tax and estate planning needs. This approach, combined with our renowned high level of personalized service, overall client experience, expertise, service and product selection, has placed our advisors as leaders in their profession.

Your Assante advisor will work with you to clarify your goals, based on your needs and lifestyle, and can then develop a personalized strategy to help you achieve them.

How much will it cost me to work with an Assante advisor?

Meeting with an Assante advisor to assess your situation will not cost you anything. They will provide a recommendation on how to invest the money you've received and will disclose all associated investment fees at that time in a clear and transparent manner.

Do I need to provide personal financial information?

You can provide as little or as much as you like. Of course, the more we know about you, the better we can understand your unique needs and goals.

Depending on your needs and the complexity of your situation, your Assante advisor may also recommend other planning strategies for you to consider.

Is there an investment minimum?

No, there is no minimum. Your Assante advisor will tailor their service and investment selection to meet your needs, providing planning advice that ranges from simple to complex.

Does McInnes Cooper receive a fee for referring me to Assante?

No. McInnes Cooper does not receive a benefit for referring you to Assante. Assante advisors sometimes collaborate with McInnes Cooper lawyers regarding planning strategies for our clients. Similarly, our clients may choose to retain McInnes Cooper to implement the various estate and tax planning strategies our advisors recommend to you.

Contact an Assante advisor today for a confidential consultation.