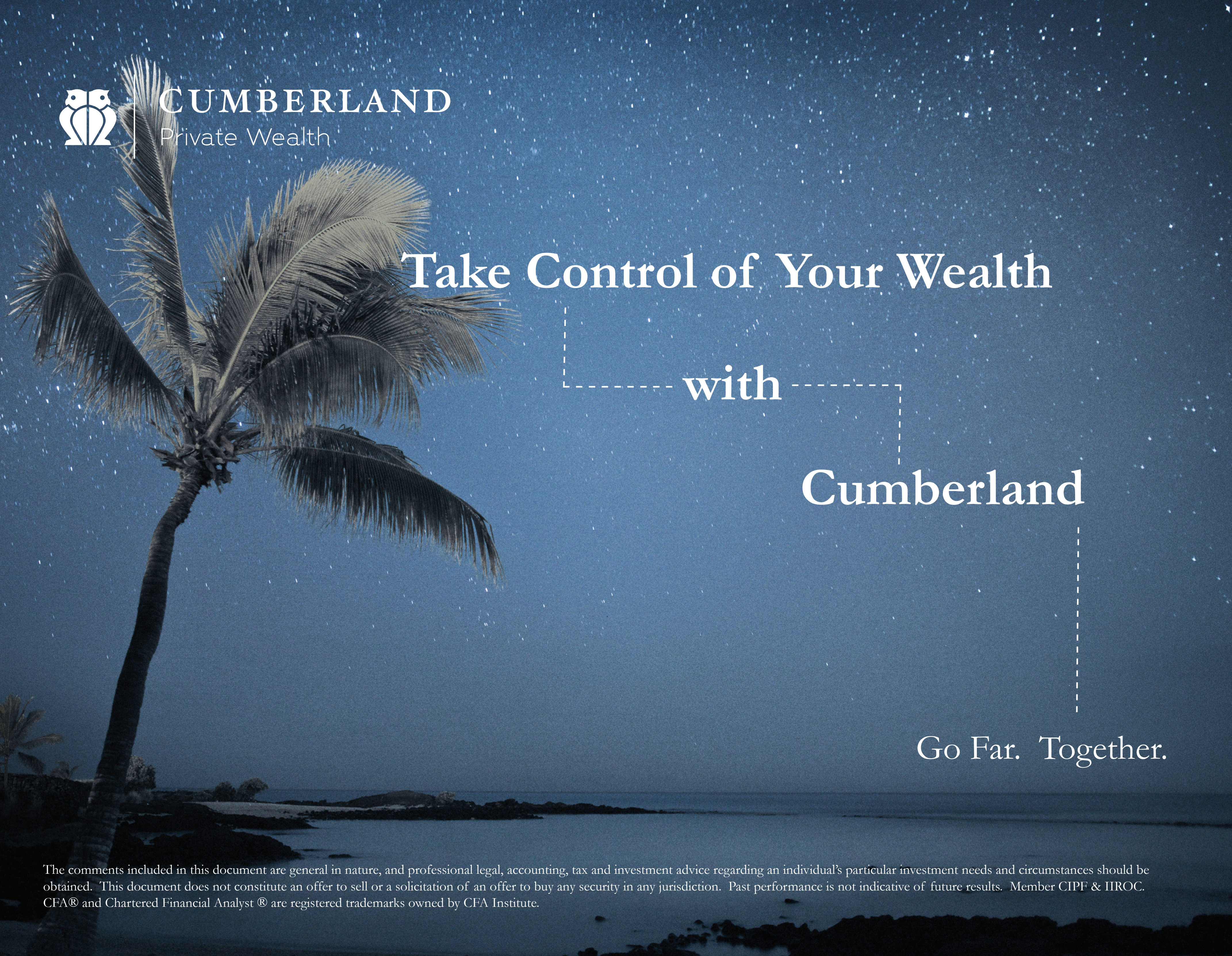

CUMBERLAND
Private Wealth
Take Control of Your Wealth
with
Cumberland
Go Far. Together.

WHO WE ARE

Founded over two decades ago, Cumberland Private Wealth is a leading Canadian wealth management firm deeply committed to our clients' prosperity and invested in their future.

With over $3.5 billion in total client assets through three affiliated companies, we have advised and served as a trusted fiduciary for some of Canada's most established families, business leaders, professionals, individuals and foundations.

We work closely with our clients to provide sophisticated wealth management solutions, bring our own experienced team but also liaise with our clients' advisors, lawyers and accountants as needed to ensure suitability and optimal execution. Together, we can accomplish more over the long term.

*Cumberland Partners Limited is the parent company of Cumberland Private Wealth Management Inc., Cumberland Investment Counsel Inc. and NCM Asset Management Ltd.

EXPERIENCE THE CUMBERLAND DIFFERENCE

- Independent
- Invested Together
- A Unique Client Experience
- Wealth Planning and Custom Solutions
- Sophisticated Investment Process and Portfolio Construction
- Proven Track Record
- Capital Protection and Risk Management
- Employee Owned

WHY PARTNER WITH US

- As business owners, we have a personal stake in your success with our interests fully aligned with yours for the long term
- We invest alongside you
- Our independence ensures that you have unbiased advice, integrity and full transparency
- You will have your own Portfolio Manager who will act as a fiduciary and assist with managing your wealth over time
- Financial, succession, tax and estate planning are integrated into our wealth solutions
- You will have a customized portfolio solution prioritizing long term growth and capital protection
- A 20 person investment team is committed to finding the best opportunities across a selection of global investment mandates
- Our track record over the past two decades is among the best in Canada
- You will have high touch service and access to senior partners and the team managing your money
- We will go far together

"We have long term relationships with good reason. Some clients have worked with our founders since the 1970's"

Christie Matwee
Portfolio Manager

CUMBERLAND
Private Wealth

HOW WE PLAN & INVEST

Your dedicated Portfolio Manager will start by garnering an understanding of your financial situation, your lifestyle goals and a review of your wealth plan. You may then also complete a financial plan.

We will then help you build an investment strategy and a customized portfolio solution reflecting your priorities, goals and objectives.

Your portfolio is constructed by drawing on our experience and expertise, using our proprietary investment process and strategies developed over several decades.

With an eye to both growth potential and protection of capital, our investment selection process combines top-down, macro-economic analysis and bottom-up research of individual securities to identify, screen and score investment opportunities within our investment mandates.

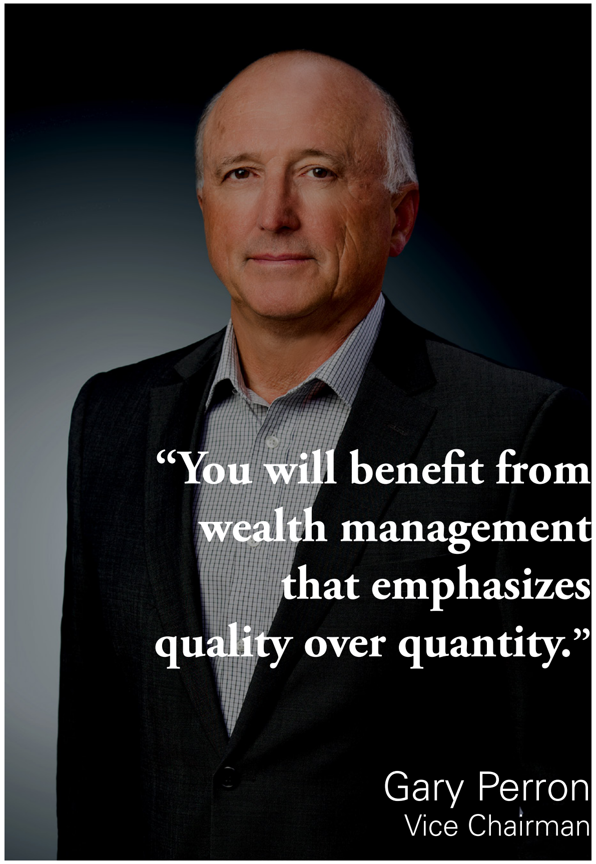
We offer a broad range of global, traditional and non-traditional investment strategies across asset classes and styles. We may utilize ETFs and alternative asset class investments as a complement within given mandates.

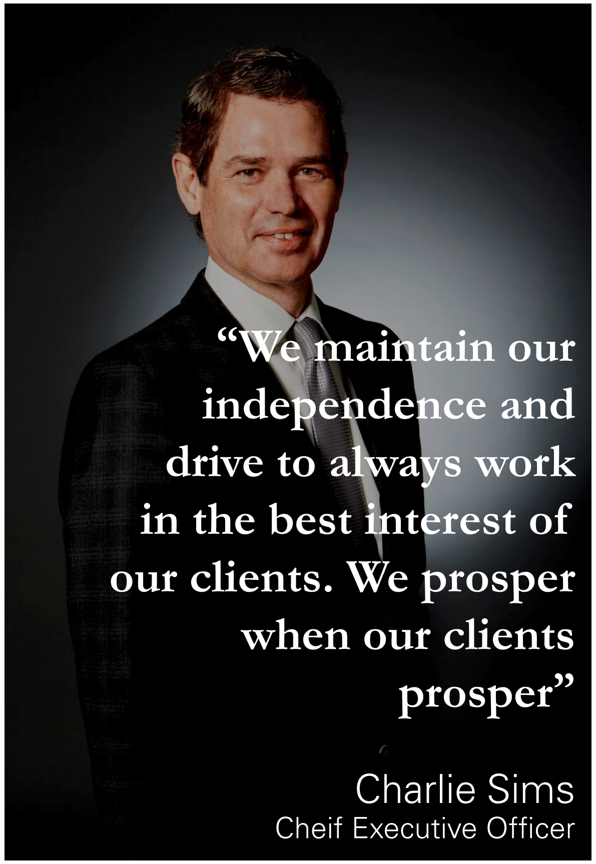
"Partnering with my clients to help them navigate the financial world to achieve success is both critical and rewarding."

Shawna Perron
Portfolio Manager

LEADERSHIP


“Whatever we recommend to our clients, we’re confident in owning ourselves”
Gerald Connor
Chairman


“You will benefit from wealth management that emphasizes quality over quantity.”
Gary Perron
Vice Chairman


“We maintain our independence and drive to always work in the best interest of our clients. We prosper when our clients prosper”
Charlie Sims
Cheif Executive Officer

CUMBERLAND PRIVATE WEALTH

Since 1997, Cumberland Private Wealth has helped families, individuals and foundations achieve their financial and lifestyle goals through careful wealth planning and advice reflected in a customized investment portfolio and executed through a sound investment strategy.

CALGARY
Shawna Perron MBA, CIM, FEA
shawnap@cpwm.ca
(403) 705-1007
Dome Tower, TD Square
Suite 1800, 333 – 7th Avenue SW
Calgary, Alberta T2P 2Z1

TORONTO
Christie Matwee MSc, MBA, CFA
christiem@cpwm.ca
(416) 413-4209
99 Yorkville Avenue, Suite 300
Toronto, Ontario M5R 3K5

Cumberland Private Wealth Management Inc.
www.cumberlandprivatewealth.com