



## About T.E. Investment Counsel Inc.

Through experienced investment counselors across Canada, T.E. Investment Counsel (TEIC) provides First Nations, Metis and Inuit communities with objective advice, investment education, process assistance and portfolio monitoring and management. Established in 1994, TEIC has more than \$2-billion in assets under management.

## Listening to You

Our team of professionals works in partnership with your community to develop an investment strategy that will assist your community to achieve its long-term goals and objectives.

## A Simple Process

Our process begins with a full discussion of the benefits to your community of a disciplined investment process. Our experience shows that clients are best served when they fully understand and commit to a disciplined process that ensures both partners, you and your investment counselor, stay focused on your long-term goals. The first step in the process is education:

### Investment Education

We help you understand the investment industry including the products and providers

### Governance and Accountability

We assist you in establishing clearly defined roles and responsibilities

### Investment Analysis and Planning

We work with you to develop and document your objectives

### Portfolio Structure and Design

We develop the most efficient and cost-effective structure of portfolio managers

### Investment Manager Search and Selection

We assist you in identifying and securing the most appropriate managers to meet your requirements

### Performance Measurement, Reporting and Interpretation

Clear, frequent communication to track performance against portfolio objectives

### Ongoing Governance and Monitoring

We help to ensure that you are meeting your fiduciary responsibilities

## Take Charge of Your Community's Future

Awareness is growing in First Nations' communities that responsibility for the future requires planning today.

*"Meeting our objectives meant  
having a process"*

Rick Morano  
Chief Investment Officer  
Mnjikaning First Nation  
Rama, Ontario

*"Investment planning isn't fun  
or easy...it's just necessary"*

Jim Prodger  
Chief Investment Officer  
Millbrook First Nation  
Truro, Nova Scotia

To learn more about T.E. Investment Counsel's customized investment solutions please contact our Aboriginal Services Department:

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**Montreal**

For more than 35 years T.E. Wealth has provided investors with objective, FEE-ONLY™ advice through offices in Vancouver, Calgary, Toronto, and Montreal. T.E. Investment Counsel (TEIC) was established in 1994 and is a wholly-owned subsidiary of Jovian Capital Corporation, a publicly listed management and holding company.