

PORTFOLIO PARTNER®

Overview

Portfolio Partner is Wood Gundy's non-discretionary fee-based platform that allows you to invest without incurring commission charges on each transaction, and giving you the opportunity to take advantage of investment opportunities as they arise.

Benefits

- Professional investment advice from your CIBC Wood Gundy Investment Advisor.
- Monthly or quarterly asset-based fee.
- Commission-free trading.
- Preferred interest rates on cash balances and margin loans.
- Ability to household² related accounts.
- No fees for up to 15 enrolled, registered accounts per household.
- No annual administration fee for one enrolled CIBC Wood Gundy Asset Advantage Account®.
- A wide selection of investment options.
- Detailed account statements and online account updates.
- Access to renowned investment, corporate and industry research.
- Year-end fee summary statement.
- Predictable fee, flexible payment.
- Fees may be tax deductible (seek advice from your tax professional).
- A minimum of 60 trades is allotted in the year of enrolment (mutual fund transactions, new issue purchases and swaps are not considered trades).

What are the fees?

- The fees are based on assets under management.

Are you the ideal client?

- You are an affluent investor with a minimum of \$100,000¹
- You are sensitive to transaction fees
- You are looking for an alternative to commissioned trading
- You seek advice and services
- You seek peace of mind

Enrolled Assets	Annual Trades
Up to \$999,999	100
Above \$1M	200
Above \$3M	350

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¹ Minimum account balance of \$100,000 per household.

² A Household comprises the beneficial owner of an enrolled Portfolio Partner account, his/her spouse and children, and also may include the beneficial owner's parents, parents-in-law, siblings and spouse's siblings. Also eligible for inclusion are Portfolio Partner corporate accounts where one or more individuals within the group have a combined beneficial ownership of greater than 50 percent. CIBC Wood Gundy is a division of CIBC World Markets Inc., a subsidiary of CIBC and a Member of the Canadian Investor Protection Fund and Investment Industry Regulatory Organization of Canada. If you are currently a CIBC Wood Gundy client, please contact your Investment Advisor.



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