

## **MPOWER Money Coaching Program Consortium Funders and Program Partners**

### **Advocis**

Advocis, The Financial Advisors Association of Canada, is the association of choice for financial advisors and planners. With more than 11,000 members in 40 chapters across the country, Advocis is the definitive voice of the profession, advocating for professionalism and consumer protection.

### **AGF**

AGF Management Limited is a premier Canadian-based investment management firm serving institutions and individuals around the globe since 1957.

### **Bridgehouse Asset Managers**

Bridgehouse Asset Managers (Bridgehouse), a trade name of Brandes Investment Partners & Co. since 2013, offers time-tested investment solutions to Canadians, leveraging the expertise of world-class investment managers. In everything it does, Bridgehouse is committed to partnering with investment professionals to help Canadians reach their financial goals and become smarter investors. Bridgehouse offers 21 mutual funds featuring a variety of asset classes, styles and objectives to meet individual needs for growth or income. Our investment managers all employ an active management philosophy, with a goal of outperforming benchmarks and peers, and helping investors build long-term wealth in their portfolios. Through one source, investors can access the expertise of four world-class investment managers: Brandes Investment Partners, L.P., Greystone Managed Investments Inc., Lazard Asset Management (Canada) Inc. and Sionna Investment Managers Inc. For more about Bridgehouse visit: [bridgehousecanada.com](http://bridgehousecanada.com).

### **City of Toronto, Employment & Social Services**

Employment and Social Services provides employment supports, financial benefits and social supports to people living in Toronto. Our Employment Centres are open to all Toronto residents, and our staff provide a range of services including helping people with:

- finding a job or the training they need to find work,
- accessing financial benefits available through the Ontario Works program, and
- connecting to health, housing, childcare and other social services.

To learn more about Toronto Employment & Social Services please visit [www.toronto.ca/tess](http://www.toronto.ca/tess)

### **Dynamic Funds**

Dynamic Funds is managed by 1832 Asset Management L.P., which offers a range of wealth management solutions, including mutual funds, investment solutions for private clients, institutional clients and managed asset programs. 1832 Asset Management L.P. is a limited partnership, the general partner of which is wholly owned by Scotiabank. ® Dynamic Funds is a registered trademark of its owner, used under license.

## **The Financial Planning Standard Council**

Since incorporation in 1995, FPSC has become the premier standards-setter for financial planning in Canada, elevating the standards of the CFP®

## **Franklin Templeton Investments**

Franklin Templeton Investments is dedicated to one goal: delivering exceptional asset management for our shareholders. By bringing together multiple, world-class investment teams in a single firm, we're able to offer specialized expertise across styles and asset classes, all supported by the strength and resources of one of the world's largest asset managers. This has helped us to become a trusted partner to individual and institutional investors across the globe.

## **IA Clarington Investments Inc.**

At IA Clarington, we believe that investing has changed. Shifting investor demand and unprecedented access to information and products have created new challenges and new opportunities. We believe that the best results for investors will be achieved by being invested – not just in the markets, but in distinctive and outcome-based product solutions, and in active, trusting relationships with advisors.

We market a wide range of investments to individual investors through their advisors, including actively managed mutual funds, portfolio solutions, socially responsible investments and target date funds. IA Clarington manages more than \$15 billion in assets (as at May 31, 2015) and is a wholly owned subsidiary of Industrial Alliance Insurance and Financial Services, Canada's fourth largest life and health insurance company.

## **Independent Financial Brokers of Canada**

IFB is a national professional association whose members are actively engaged in the provision of financial advice and products to Canadians in communities across Canada every day. Our members are licensed professionals, most often as securities registrants holding mutual fund licenses and/or as life insurance brokers. Many hold complementary financial licenses, enabling them to provide services and advice related to the exempt market, mortgages, deposits, etc. Our members operate as independent business people - they are not employees of a securities firm, bank or insurance company.

IFB is committed to supporting and enhancing the protection of investors and the professionalism of our members in the marketplace. We offer ongoing continuing education events in various locations across Canada, an affordable and comprehensive professional liability insurance program, compliance tools and support, and regular updates on financial regulations and other matters of importance to the conduct of our members with investors and clients. In addition, we advocate with government and regulators on behalf of our members in support of a fair and inclusive marketplace, that fosters competition from a variety of business models. We believe this is essential so that Canadians of all financial means can access financial advice.

## **The Investment Funds Institute of Canada**

The Investment Funds Institute of Canada is the voice of Canada's investment funds industry. IFIC brings together 150 organizations, including fund managers, distributors and industry service organizations, to foster a strong, stable investment sector where investors can realize their financial goals. By connecting Canada's savers to Canada's economy, our industry contributes significantly to Canadian economic growth and job creation. The organization is proud to have served Canada's mutual funds industry and its investors for more than 50 years.

## **Sun Life Global Investments**

About Sun Life Global Investments

At Sun Life Global Investments, we believe that thinking and acting from a global perspective brings to light the best opportunities for our investors. As part of Sun Life Financial, we have access to investment analysts located around the world that have sought out and engaged best-in-class investment managers. We have our finger on the pulse of global trends and market conditions, giving us the ability to offer some of the best investment ideas from around the world. Our diverse line-up of mutual funds, investment solutions and services are designed to help you pursue your goals, both now and in the future.

## **Zavitz Insurance**

Zavitz Insurance Inc. was founded in 1983 by Terry Zavitz with the vision of becoming an industry leader and innovator focused on providing comprehensive insurance solutions with unparalleled customer service.

Over the last 30 years Zavitz Insurance has grown to become a team of amazing professionals who are passionate about both their work and giving back to their community. We provide diverse, leading edge disability, life and group insurance solutions that are tailored to protect the personal and professional long-term wellbeing of our clients and their families.