

INVESTMENT & TRUST ADVISORY SERVICES



**Building today
for future
generations.**

**Your community.
Your legacy.**



INVESTMENT AND TRUST ADVISORY SERVICES

INVESTMENT ADVISORY, COMMUNICATIONS AND FINANCIAL EDUCATION SUPPORT

About Us

There is a significant amount of new wealth being created across Canada as a result of land and specific claim settlements, resource sharing opportunities, gaming revenues, economic development and other revenue generating sources. This can place tremendous responsibility upon leadership to effectively manage these new resources. As a leading national financial services firm for over 45 years, T.E. Wealth's dedicated Indigenous Services practice provides comprehensive, independent investment and trust management services to assist in the planning and implementation of customized wealth management strategies. Our multi-disciplinary approach includes investment advisory support, communication and financial education services with an emphasis on establishing a long-term relationship with each of our clients.

“T.E. Wealth went well beyond the investment process by helping us assess and address our community readiness”

Sharon Stevenson, Trust Manager • Peguis First Nation TLE Trust, Manitoba

“Meeting our objectives meant having a process”

Rick Morano, Chief Financial Officer
Chippewas of Rama 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

Our Approach

At T.E. Wealth, we view our role very simply...to use our expertise, experience, technology and infrastructure to assist our clients in making educated and well informed decisions surrounding all facets of the Trust and investment management process based on local circumstances.


We work with community trustees and leadership to provide the necessary advice, methodology and support in an unbiased and objective manner with the ultimate objective of developing the most efficient and cost effective solution for both today and the future.

Community Readiness

- Setting a vision and establishing community priorities
- Managing community change through effective communication and financial education including specific member consultation and engagement
- Investment and trust education including governance training
- Getting the team together which includes Search and Selection support services to assist in the identification of the most appropriate firms for “the team” (e.g. Legal, Corporate/Administrative Trustees, investment Management)

Development of the Statement of Investment Policies and Guidelines

- An investment strategy should leave no room for interpretation. We help assess risk, return and cash flows in the development of appropriate asset allocation strategies; spending policies; investment guidelines and constraints including Socially Responsible Investment guidelines; roles and responsibilities; reporting requirements and a mechanism for ongoing policy and manager reviews.



Building capacity

“AFOA Canada is pleased to recognize T.E. Wealth Indigenous Services as a national sponsor including their contribution to our Trust Management workshop; their participation in the Journal of Aboriginal Management, and their support to our Provincial AFOA Chapters across Canada.”

Terry Goodtrack, President and CEO • AFOA Canada



Assistance in the Design of the most Cost Effective Portfolio Structure

- We use our experience and understanding of the investment industry to assist in the design of the most efficient investment portfolio structure based on costs; the level of assets under management; the number and types of investment management firms; decisions surrounding active and passive investment strategies; risk and more.

Investment Manager Search and Selection

- Through our dedicated investment manager research team, we assist in the development of specific manager search criteria with the intent of utilizing this information in assessing the available universe of investment management firms available. Investment managers are assessed based investment performance, risk management protocols, fees, their buy & sell philosophies, human resources policies, capital structure, technological capabilities and how their past performance relates to the current firm structure including professional turnover and ownership. A long list of candidate firms that meet such criteria are identified with facilitation of the interview and selection process provided by T.E. Wealth.

Investment Performance Monitoring, Measurement and Interpretation

- It can be suggested that investment underperformance is not the key issue but more so when those responsible for investment performance are not aware when an underperformance situation exists. . . Being informed is essential. Investment review meetings are held quarterly with comparisons made to appropriate market indices, the level of risk being taken for each unit of return received, the manager's peers as well as the overall goals and objectives of the Trust or investment assets.

T.E. Wealth's Indigenous Services is trusted by communities for so many reasons:

- One of Canada's Leading Indigenous Services Practices
- Proven Trust Advisory Process
- Multi-Disciplinary Approach to Wealth Management
- All-Inclusive, All-Encompassing Fee Structure
- National Firm with over 45 Years of Excellence

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V.P. Indigenous Services

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Your community. Your legacy.

To learn more about T.E. Wealth, please contact us: www.tewealth.com/indigenous · 1-866-430-0537

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