CIBC Wood Gundy
Madams Advisory Group

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CLIENT SERVICE AGREEMENT

ONE TEAM, ONE MANDATE: YOU

With over $200 million in assets under management*, we maintain an exclusive practice for a select group of multigenerational families and institutions. Our mission is to provide outstanding results and service, and build the kind of trusted relationships that endure the test of time.

We start by listening. Then, we create a comprehensive plan that incorporates your complete financial life and long-term ambitions. Our solutions are designed to accomplish these objectives by integrating efficient tax and estate planning strategies with forward-looking investment and risk management.

**as of March 2019*

A CUSTOM APPROACH AND INTEGRATED SERVICES

We collaborate with you and your other trusted advisors to help create integrated solutions for family specific and philanthropic goals, incorporating investment management, estate and tax planning and trust and charitable giving strategies.

We have an experienced team that can provide advice in pre- and post-liquidity planning, connecting you with advisory specialists to facilitate capital markets transactions, complex planning and the structure of your charitable vehicles. Accessing the deep resources of the CIBC group of companies, our team is positioned to address the realities of today's economy and to help meet the wide range of your sophisticated needs.

We call this approach: **Advice beyond investing.**

OUR SERVICES

We provide a fully integrated approach to wealth management by offering value-added services for affluent families. Offering knowledgeable, objective guidance in all aspects of wealth management, we attentively serve our clients.

Our Services include:

- Asset management
- Trust and estate planning strategies
- Business transactions (buy/sells)
- Philanthropic planning
- Private Banking
- Alternative investments
- Concentrated stock strategies
- Investment banking resources
- Insurance advice and review

THE BENEFITS OF WORKING WITH MADAMS ADVISORY GROUP

We believe clients trust the Madams Advisory Group because:

We are committed to risk management in helping to protect and compound the wealth we are entrusted to manage.

We are experienced investment professionals, well-versed in markets and complex family and institutional circumstances.

We offer independent and objective advice on investment strategies, strategic planning and client-specific goals.

We provide dedicated client service, delivered as a team, to a select client base with the strictest confidentiality.

WHAT'S THE COST?

Our clients enjoy a transparent flat cost of investing, negotiated based on the investment amount deposited and complexities of the advice required.

OUR CURRENT BASE FEE-SCHEDULE

Household Account Assets (CA$)	Equity/Balance Strategy	Fixed Income/Custom Note Stategy
$250,000 - $499,999	1.50%	1.25%
$500,000 - $999,999	1.25%	1.00%
$1,000,000 - $4,999,999	1.00%	0.90%
$5,000,000 +	Negotiated	Negotiated

The above schedule includes all services provided directly by the Madams Advisory Group.