

Counsel Introduces IPC Private Wealth Visio Pools

Toronto (November 9, 2020): Counsel Portfolio Services Inc. (“Counsel”) today announced the launch of IPC Private Wealth Visio Pools. The Pools provide an investment approach that is typically only available to investors in separately managed account programs, using an efficient portfolio design that aims to meet the needs of mass affluent and high net worth investors.

The Visio Pools offer investors access to a concentrated selection of high-conviction strategies, clearer knowledge of what they hold, and a better understanding of how their investments are managed.

The North American and U.S. equity components of the IPC Private Wealth Pools will be sub-advised by Sionna Investment Managers and Marsico Capital Management respectively, while the core fixed income strategy will be sub-advised by Mackenzie Investments.

The IPC Private Wealth Visio Pools provide exposure, through their underlying holdings, to a selection of approximately 25-30 Canadian and U.S. equities. The Pools’ fixed income component is comprised of a laddered bond strategy that includes a select set of high-quality investment grade bonds to enhance capital preservation, provide regular income, and opportunities for capital gains over time. For added global diversification, these actively-managed strategies are complemented with an allocation to international equity and fixed income ETFs that provide the opportunity for long-term growth through continuous market exposure. The result is a portfolio that closely resembles strategies that are typically only offered by discretionary portfolio managers.

“The concentrated holdings give investors access to these portfolio managers’ best investment ideas,” said Kevin Hurlburt, Executive Vice-President, Products and Services at Investment Planning Counsel. “Through our enhanced quarterly reporting, it also provides investors with more visibility to their individual holdings and a better understanding of how their money is invested, he explained. “Combined with our disciplined portfolio design and manager selection process, this new offering allows us to provide investors the opportunity to access high-conviction strategies through a simple single-solution diversified portfolio,” Mr. Hurlburt added.

The new portfolios will be available for purchase starting November 9, 2020:

- IPC Private Wealth Visio Income Pool
- IPC Private Wealth Visio Balanced Pool
- IPC Private Wealth Visio Balanced Growth Pool
- IPC Private Wealth Visio Growth Pool

About Counsel Portfolio Services Inc.

Counsel is a subsidiary of Investment Planning Counsel Inc. (“IPC Inc.”). With \$4.6 billion in assets under management as at October 31, 2020, Counsel provides comprehensive, objective portfolio solutions utilizing the strength and expertise of third-party portfolio managers. Counsel, through IPC Inc., is a member of the IGM Financial Inc. (TSX: IGM) group of companies. IGM Financial is one of Canada's premier financial services companies.

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