

Guardian Endowment Services

Building Legacies Together



Our Goal – Helping Charities Fulfill Their Missions

Operating a charity is no easy task. Expertise in governance, fundraising, operations and financial management is necessary for any successful charity. Attracting volunteers, staying abreast of changing legislation, and reporting to numerous stakeholders are all daunting tasks. Combined with a competitive and crowded fundraising arena, each charity faces the challenge of making an impact while managing day-to-day tasks.

Managing a charity's assets is one of many important tasks that a charity is required to undertake. At Guardian Capital Advisors (GCA), we understand the unique needs of charities. We know the challenges they face in fulfilling their mission. Through understanding the **UNIQUE** needs of charities, we have developed customized solutions and strategies.

Our fundamental goal is to help each and every charity bring its vision to life, to ensure that its impact is felt now and in the future. We support our clients and the communities they serve, and understand the power of giving and the empowerment it bestows.

We Are Here to Help

Whether your investment goals are complex or simple, Guardian Capital is here to help. Our strategies are designed to preserve and grow capital, while generating the funding your organization needs to support its operations and activities.

We work with your staff, Investment Committee and Board of Directors to ensure your assets are managed with the highest level of prudent investment oversight. Sound investment advice in tandem with operational expertise, active participation and open communication is what sets us apart.

Guardian Capital's multi-dimensional service offering will complement—and help magnify—your impact.



50+ YRS
of experience

1000+
PRIVATE FAMILIES

90+ INSTITUTIONAL
CLIENTS

GLOBAL
OFFICES

Your Advisor, Your Partner

Guardian Capital Advisors is focused on the wealth management of both families and institutions. GCA is part of the Guardian Capital Group Limited family, a diversified financial services firm with over 50 years of experience.

With offices in Toronto, Calgary and Vancouver, we are able to service our clients locally. We prove our expertise through the client relationships we develop and the diversified and sophisticated asset management solutions we create.

Asset Management for Charities – Our Priorities

Guardian Endowment Services (GES) is a reflection of our profound commitment to servicing the needs of Canadian charities. Through our diverse and unique services, we aim to help charities grow through sound investment management and other services designed to build the capacity of your organization to raise even more.

The Investment Policy Statement – Where the Process Begins

Guardian Capital works with you to create or refine your Investment Policy Statement (IPS), which serves as the roadmap for your portfolio.

Through collaboration, we will create an IPS that is consistent with your goals, objectives and risk appetite. We actively monitor the IPS, using it as guidance for our discussions with your Board, management and Committees.

Portfolio Design and Construction

Our custom-designed portfolios benefit significantly from proprietary research, decisive risk management, and diversification across all regions and assets classes, including Environmental, Social and Corporate Governance (ESG) practices.

Our portfolio management services can integrate with your designated legal, reporting and accounting requirements. Full transparency combined with our experience, aptitude, and administrative support, allow you to focus on your organizational mission.

Guardian Endowment Services – Building Legacies Together

Endowment funds can help charities fulfill their missions. In an increasingly complex environment, charities need to ensure that their investment partners have the ability to:

- Develop effective guiding principles through the Investment Policy Statement
- Understand the regulatory environment and investment standards governing charities
- Create portfolios that reflect a charity's investment objectives and risk tolerance
- Ensure their partners are well-versed in the latest developments in charitable investment management

CONTACT US

To continue the conversation and obtain more information, please contact your local Charity and Foundation Specialist today.

TORONTO

Anthony Messina, CA, CPA, CFA®
Managing Director,
Private Wealth Management
416-364-8054
amessina@guardiancapital.com

Thierry Di Nallo, CFA®
Vice President & Portfolio
Manager 416-947-4075
tdinallo@guardiancapital.com

Doug Farley, CFA®
Senior Vice President &
Portfolio Manager
416-350-3114
dfarley@guardiancapital.com

Matthew Baker, CFA®
Vice President & Portfolio
Manager 416-947-4095
mbaker@guardiancapital.com

CALGARY

Steven Rowles, CFA®
Client Portfolio Manager
403-776-4478
srowles@guardiancapital.com

Christie Rose, CFA®
Vice President &
Portfolio Manager
403-296-3832
crose@guardiancapital.com

VANCOUVER

Mark Bodnar, CFA®
Client Portfolio Manager
604-632-9596 x6022
mbodnar@guardiancapital.com

Michael Frisby
Senior Vice President &
Portfolio Manager
604-632-9596 x6011
mfrisby@guardiancapital.com

Michael Barkley, MBA, CFA®
Senior Vice President &
Portfolio Manager
604-632-9596 x 6012
mbarkley@guardiancapital.com

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