Welcome to Richardson Wealth

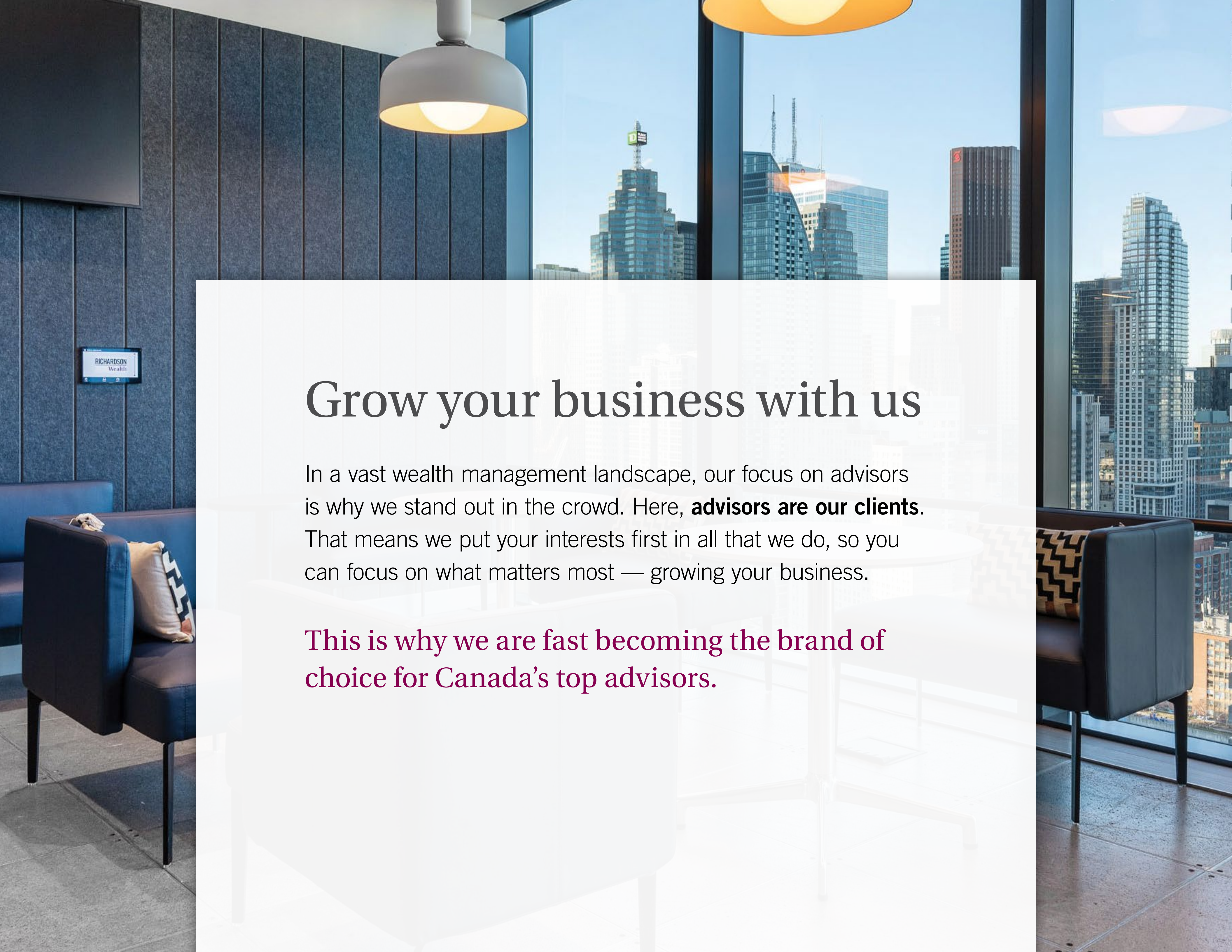
April 2024

RICHARDSON
Wealth

"We align with the Richardsons in such a genuine and truthful way — their ethics, values, their deep-rooted entrepreneurialism, the importance of family and community. These are the things that are fundamental to us, individually and as a team of professionals. This is a perfect fit."

– Tim Conlin

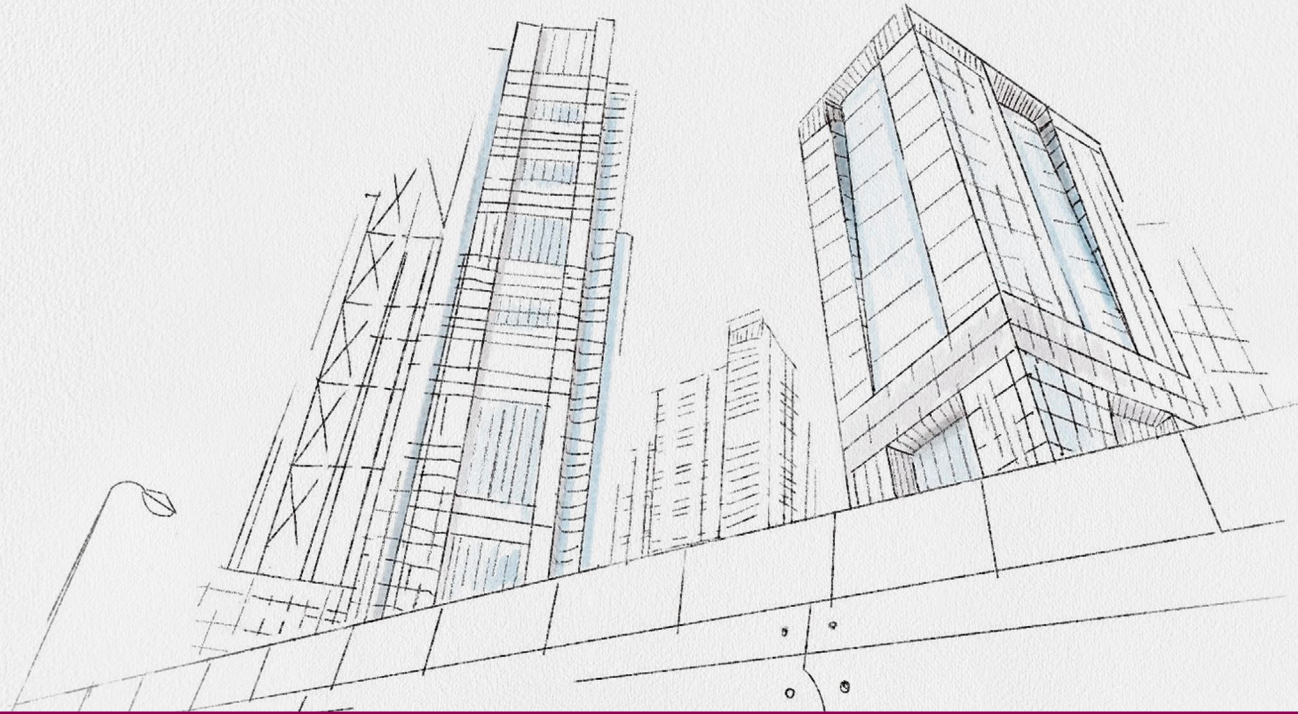
RICHARDSON Wealth | THE CONLIN GROUP



Grow your business with us

In a vast wealth management landscape, our focus on advisors is why we stand out in the crowd. Here, **advisors are our clients**. That means we put your interests first in all that we do, so you can focus on what matters most — growing your business.

This is why we are fast becoming the brand of choice for Canada’s top advisors.



We’re determined to make it easier for advisors to succeed here more than anywhere else.

"Richardson Wealth's commitment to serving high net worth families in all areas of their wealth management is unique. As an advisor, I appreciate the freedom to choose how our team manages our clients' portfolios."

– Rosemary Horwood

RICHARDSON Wealth | ROSEMARY HORWOOD WEALTH

We're ready to help you build your business

Our entire firm is dedicated to building and cultivating a best-in-class, boutique culture that places advisors at the core.

1.

Your business, your way

Run your practice as you see fit, fully supported by our team of industry professionals.

2.

Leading-edge tools

PM tools, Envestnet trading platform, advanced internal reporting and client solutions — including our state-of-the-art My NextGen Plan software — and guidance to leverage your digital presence.

3.

Open door policy

We value open communication and encourage your input — whether that's feedback or advice — we want to hear from you.

4.

Leading investment product shelf

Alternatives, private placements, proprietary and third-party investment solutions — curated by our experienced investment team.

We focus on you, so you can focus on your clients

Enjoy the autonomy to grow and enhance your client relationships, supported by the best-in-class tools, technology and access to support you need to succeed.

- **Seamless transition**
  Fail-proof onboarding process guided by our team of highly experienced professionals, streamlined with eSignature option for client ease
- **Customized marketing strategy**
  A dedicated marketing team to help you develop custom materials tailored to your needs and individual brand
- **Professional development**
  Ongoing opportunities for peer learning and coaching, like Richardson Wealth Masterclass to help you grow your practice and your team
- **Comprehensive wealth services**
  Planning tools, tax and estate planning professional support, in-house insurance, Private Family Office and more
- **Strategic partnerships**
  Access to new issue deal flow, third-party research and other valuable capabilities
- **Concierge-level support**
  Dedicated point of contact and responsive teams who provide the utmost attention to service to help you build your brand and grow your business
- **Culture of sharing**
  A collaborative environment where advisors work together to help each other succeed

Delivering an exceptional advisor experience is what sets us apart.

The name on the door

As an advisor, your own team name is displayed on the door alongside ours based on shared values and a singular commitment to clients.

"For me, the Richardson name was what attracted me most. Their name represents a deep-rooted history with seven generations of wealth, true holistic wealth management practices, and a firm where my voice is heard and valued."

– Kathy McMillan

RICHARDSON Wealth | McMILLAN WEALTH SOLUTIONS

The Richardson name embodies longevity, trust and integrity.

A rich legacy

For more than 90 years, Richardson Wealth has been serving Canada's high net worth families. In an industry where longevity is rare, it's our enduring connection to our founders, the Richardson family, that makes us unique.

Since 1857, the Richardson family has built a strong reputation for entrepreneurship, stability and achievement.

Today we continue to see that pioneering spirit reflected in our thriving firm.

A blueprint for success built on our proud history.

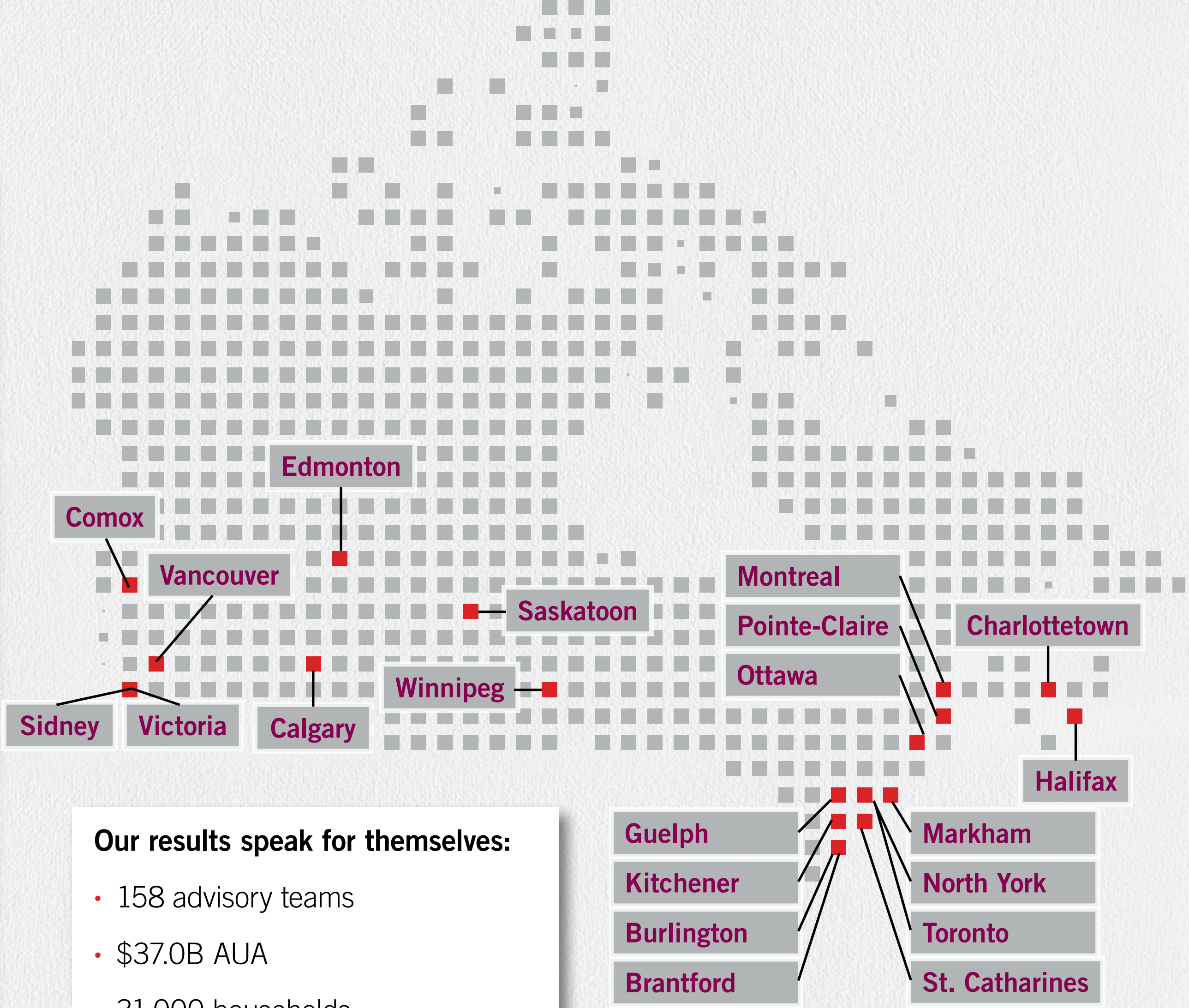
"The partnership culture at Richardson Wealth provides us with the opportunity to have a say in the direction of our organization. We benefit and thrive on the success of our fellow partners. Management practices what they preach — it is a culture like no other."

– Allan M. Fenerdjian

RICHARDSON Wealth | FENERDJIAN WEALTH

Our present success

Leveraging the knowledge and experience that comes with having a long history, we confidently and responsibly trailblaze our way into the future.



Our results speak for themselves:

- 158 advisory teams
- $37.0B AUA
- 31,000 households

*as at March 31, 2024

Our collaborative culture has helped us grow to where we are today.

A culture of diversity

We're dedicated to defining the meaning of diversity and inclusion in the workplace and devoted to providing an inclusive, diverse, caring and welcoming culture at our firm.

Best Workplaces™ for Women
Great Place To Work®
CANADA 2021

WXN

PRIDE AT WORK CANADA
FIERTÉ AU TRAVAIL CANADA

We're proud to be a progressive corporate leader.

"Richardson Wealth is the first firm I have worked for where I truly felt encouraged to be myself. As a woman in a male dominated industry, I feel supported, encouraged, extremely valued and that my upside and options are limitless."

– Alexandra Horwood

RICHARDSON Wealth | ALEXANDRA HORWOOD & PARTNERS

A bold future

This is an inspiring time to join Richardson Wealth. We're confident in our firm's future and well positioned for long-term success in the dynamic, fast-expanding wealth management industry in Canada.

Our bold and audacious growth plan

Our five-year plan is to grow our assets significantly and be the brand of choice for Canada's top advisors and their high-net-worth clients.

Assets Under Administration (AUA)

$100B

from $33B

Revenue

$1B

from $300M

EBITDA

$200–300M

from $50M

Take the next step with Richardson Wealth

Get ready for your business to thrive

Looking for a new home aligned with your values? A place where your voice and experience matters, and you are empowered with leading tools that offer an extraordinary client experience?

That place is Richardson Wealth. Wherever you are in your practice journey — building, growing, maturing or starting to think about succession — we're here to help with the transition.

Welcome home.

Transition your practice

Our experts will help guide you through the process to ensure a successful move. With years of experience working with advisors, we've developed a diligent, thoughtful method that encourages autonomy while supporting you and your team every step of the way.

Get ahead of the game

A successful transition begins with a solid strategy. Begin the planning process at least six weeks before you resign from your current firm.

Essential steps include:

- **Discovery meeting**
  Meet our subject matter experts and leaders to learn more about our culture and our dedication to helping advisors thrive.
- **Agreement review**
  Check your existing agreements and ensure you abide by any non-solicit or other clauses that could impact how you plan and execute a move.
- **Transition meeting**
  Create a transition plan guided by our seasoned experts who will equip you with a robust checklist of preparation activities.
- **Communication materials**
  Share your excitement about joining Richardson Wealth with a new website, brochures, and focused communications to help guide client conversations.
- **Wellness pause**
  Take time for yourself to connect with friends and family in advance of a transition. Moving firms is hard work and you'll be more energized if you invest in important relationships and feel supported.

"I originally joined Richardson Wealth for more freedom and flexibility as I build my practice. Richardson Wealth is differentiated in the way that advisors are treated like clients and that each advisor team is supported in running their business, their way."

– Neil Bosch

RICHARDSON Wealth

BOSCH
INVESTMENT GROUP

Partner with a firm that is wholly dedicated to investing in your success

At Richardson Wealth, advisors' voices matter, diverse perspectives are valued, and our culture and open architecture is entirely geared towards your success.

Let's talk.

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