

THE INDEPENDENT PLATFORM

INDEPENDENT MANAGERS

Experienced independent managers with deep institutional roots









SUPPORT & VALUE ADD

Mental Health & The Financial Advice Relationship

 Tools to help advisors encourage investor well-being





Train the Investor Brain

• Tools to help overcome common investor misperceptions

BEST INTEREST PRODUCTS

Small cap equity

• U.S. equity

Offering many asset classes

- Balanced
- Canadian equity
- · Emerging markets
- · Global & international equity
- Fixed income
- Income

Addressing investor concerns

- VOLATILITY
- INCOME
- FEES
- ALPHA
- CURRENCY

bridgehousecanada.com







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BRANDES SNAPSHOT

FOUNDED • 1974

TEAM • 50+ investment professionals

PRESENCE • 5 offices in 4 countries

ASSETS • US\$ 23.9B as of December 31, 2019



LAZARD SNAPSHOT

FOUNDED • 1848*

TEAM • 300+ investment professionals

PRESENCE • 20 offices in 14 countries

ASSETS • US\$ 222.9B as of December 31, 2019

M\(\tag{RNINGSTAR}^\)

MORNINGSTAR SNAPSHOT

FOUNDED • 1984

TEAM • 110+ investment professionals

PRESENCE • 10 offices in 28 countries

ASSETS • US\$ 237.1B as of December 31, 2019



SIONNA SNAPSHOT

FOUNDED • 2002

TEAM • 8 investment professionals

PRESENCE • Headquartered in Toronto, Canada

ASSETS • CA\$ 3.6B as of December 31, 2019

^{*}Lazard's asset management operations began in London, UK in 1953. Lazard assets include those of Lazard Asset Management LLC (New York) and its affiliates, but does not include those of Lazard Frères Gestion (Paris) or other asset management businesses of Lazard Ltd.