

INDEPENDENT MANAGERS

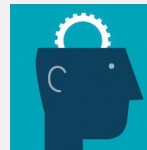
Experienced independent managers with deep institutional roots



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

Offering many asset classes

- Balanced
- Canadian equity
- Emerging markets
- Global & international equity
- Fixed income
- Income
- Small cap equity
- U.S. equity

Addressing investor concerns

- VOLATILITY
- INCOME
- FEES
- ALPHA
- CURRENCY

bridgehousecanada.com



BRIDGEHOUSE

INDEPENDENT PLATFORM



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



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.