

FIDELITY PRIVATE INVESTMENT PROGRAM

Fidelity Private Investment Program

As you move up the wealth continuum, your needs and preferences begin to shift. You look for investment products that meet your distinctive needs – needs like exclusivity, stability, tax efficiency and reduced fees. You want the assurance of knowing your assets are being managed by an investment firm you trust.

Benefits:

- **Institutional-style management** through Fidelity's institutional money management team
- **Low costs** through tiered pricing and fixed operating expenses
- **Tax efficiency** with corporate class and tax-efficient cash-flow options
- **Product choice** through a series of fourteen mandates covering all major asset classes
- **Enhanced reporting** provides factual and informative account information
- **Strength of Fidelity** from one of the largest and most trusted investment managers in the world

Overview:

Fidelity has been managing money for pension funds, foundations and endowments for over 40 years. Fidelity established Pyramis Global Advisors to develop new investment approaches for institutional clients. Fidelity Private Investment Program draws on the strength, resources and worldwide presence of Pyramis Global Advisors. Together, these two organizations bring discipline and consistency to the Fidelity Private Pools for affluent Canadians.



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Benefits of the Fidelity Private Investment Program:

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The Fidelity Advantage

Responsibility

- A trusted steward of client assets for over 65 years
- World's largest independent and privately owned fund management company
- \$2.0 trillion AUM

Reach

- Global presence with local knowledge
- More than 800 investment professionals

Research

- The cornerstone of Fidelity's investment approach
- Security selection is our primary focus, driven by rigorous fundamental research
- Proprietary research conducted around the world
- Team Canada is the largest buy-side equity team dedicated solely to the Canadian market

Results

- Seeking to deliver solid long-term performance
- Team structure produces idea generation and consistency of process
- Over 65 years of innovation

Reputation

- One of the strongest, best managed investment companies in the world