

# WHY WELLINGTON-ALTUS?



Our move was prompted by our desire to continue to do what we believe is best for our clients. Here's why we chose Wellington-Altus:

## Safety of Assets

At Wellington-Altus, you get the best of both worlds: truly independent and objective advice with big bank safety. We have rock-solid financial stability with the security of a Schedule 1 bank. Clients can invest with confidence knowing that National Bank Independent Network (NBIN), a division of National Bank of Canada, ensures the safe custody of all assets and performs our back-office services.

## Independence

We offer objective and impartial wealth advice with no sales quotas. Our agile approach to the complex needs of high-net-worth clients recognizes that wealth management has evolved from selling cookie-cutter solutions, to specialized service and independent advice. Our advisors are free to do what is best for their clients, every time.

## Outstanding Client Experience

Wellington-Altus embraces innovation, values the importance of investing in technology, and believes in having the best of what's available for clients and advisors. They have partnered with leading-edge providers to deliver best-in-class technology and platforms, with access to some of the best money management solutions in Canada. Being fully operational with remote access means advisors can seamlessly service clients anytime, from anywhere.

# WHO IS WELLINGTON-ALTUS?



Founded in 2017, Wellington-Altus Private Wealth Inc. (Wellington-Altus) is the top-rated\* investment dealer in Canada and one of Canada's Best Managed Companies. With more than \$30 billion in assets under administration and offices across the country, Wellington-Altus identifies with successful, entrepreneurial advisors and their high-net-worth clients.

*\*Investment Executive 2024 Brokerage Report Card*



“ We’ve built a fresh culture around technology-enabled agility, client-focused service, investment advisor collaboration, and a shared love for what we do. We’re bonded by our passion for paving a new road within the investment industry and together, we’re seeing the benefits of our forward-thinking approach.”

**Shaun Hauser**

*Founder & CEO, Wellington-Altus Financial Inc.*