Keep your assets **safe and secure**

Regulator approved
Credential Securities® is regulated by the Investment Industry Regulatory Organization of Canada (IIROC), which sets, monitors and enforces standards for the Canadian investment industry.

Solid asset protection
Your Credential Securities account is protected by the Canadian Investor Protection Fund (CIPF).

Client due diligence
Credential works only with portfolio manager firms registered with a Canadian securities commission.

Financial strength
With more than 20 years of experience in the Canadian financial services industry, parent company Credential Financial Inc. administers $20 billion in client assets and partners with over 225 companies from coast to coast.

Get to know **Credential**

Established in 1995, Credential Securities is a national investment dealer offering full service and online brokerage, clearing and custody services to credit unions and independent financial institutions across Canada.

Credential Securities is registered as an Investment Dealer with all Canadian Securities Commissions and is a member of the following organizations:

- Investment Industry Regulatory Organization of Canada (IIROC)
- Canadian Investor Protection Fund (CIPF)
- Toronto Stock Exchange
- TSX Venture Exchange
- Montréal Exchange
- Canadian Alternative Trading Systems
- Canadian Depository for Securities
- The Depository Trust Company
- FundSERV Inc.

Credential Securities is a wholly owned subsidiary of Credential Financial Inc., which is jointly owned by the Provincial Credit Union Centrals and The CUMIS Group, a subsidiary of The Co-operators.

Learn more at **credential.com**

Credential®
Correspondent Partners

CCP 2014 04 003-EN

Keep your **financial future safe**

Credential Correspondent Partners is proud to be your Portfolio Manager's recommended custodian partner.

Credential Correspondent Partners is a division of Credential Securities Inc. We provide custody, trading, clearing, processing and reporting services for portfolio managers and independent wealth management firms.

Through Credential Correspondent Partners, your Portfolio Manager gains access to:

- A full range of investment products
- Account management and administration tools
- Leading industry investment research and guidance
- Highly efficient custodian and trading operations

A partnership with Credential means your Portfolio Manager can focus on what's important — you and managing your portfolio.

How we **work**

Credential is responsible for the safe keeping of your assets, account maintenance, trade settlement and reporting, including statements and tax reporting.

Your Portfolio Manager is responsible for monitoring and managing your investment portfolio and for trading according to your instructions. Your Portfolio Manager is your key contact and provider of information.

Where are your assets held?
Your account is held in your name with Credential Securities Inc., a member company of Credential Financial Inc.

How can you deposit funds into your account?
You can deposit funds into your account by cheque, electronic funds transfer, or through the online bill payment facility at your financial institution.

How can you withdraw funds?
You can withdraw funds by submitting a request to your Portfolio Manager.

How can you monitor your assets?
You will receive monthly statements from Credential Securities when there is activity in your account; otherwise, quarterly statements will be issued.

Secure online access to your account allows you to view activity, statements and tax documents at any time.