



OUR STORY

Founded in 2017, Wellington-Altus Private Wealth (Wellington-Altus) is one of the fastest growing wealth advisory companies in the country.

With more than \$10 Billion in assets under administration across Canada, we value being an independent firm that always puts the best interest of our clients first.

Through years of experience, our advisors are able to recognize each client's unique goals and provide honest guidance, customized planning solutions and desired results.

Our clients can invest with confidence knowing the National Bank Independent Network (NBIN), a division of National Bank of Canada, ensures safe custody of all assets and performs our back-office services with the security of a Schedule 1 bank.

INDEPENDENCE

Our company was built by investment advisors, for our clients. You come first. We are proud to offer you advice, free from sales tactics. Open architecture ensures the best product selection.

ENTREPRENEURIAL

You receive the direct benefit of solutions tailored to your specific situation.

UNCONSTRAINED

We are a strong institution that understands every client is unique. Our advisors are free to do what is right for their clients — **every time**. We will never have quotas, only the best is what our clients deserve.

“

Independent wealth management puts clients first in a way that large corporate institutions just can't. Independent advisors can focus on delivering financial advice to clients and managing their assets on a world-class platform.”

Charlie Spiring, ICD.D, *Chairman & Founder*
Previous chair of the Investment Industry Association of Canada



WELLINGTON-ALTUS

PRIVATE WEALTH

HOW WE CAN HELP

Wellington-Altus Advisors work to deliver in-depth guidance and solutions tailored to each client's needs.

We aim to help you preserve and grow your wealth in every aspect.

With access to a full range of our Wealth Management Solutions, you can feel secure for your future.



WORKING TOGETHER TO SHAPE YOUR FINANCIAL FUTURE.

