FIDELITY PRIVATE WEALTH

The strength of Fidelity

Design your masterplan

At Fidelity Private Wealth, we believe that big dreams require equally big plans.

We work with affluent individuals and families across Canada to design customized and integrated wealth plans that help turn their vision into reality.

We bring the full strength of Fidelity to our private wealth clients.

Fidelity's global organization has extensive resources and expertise with a disciplined investment process.

For over 35 years, we have been designing an array of innovative products to help build better financial futures for investors like you.

Our consultative approach provides a solid foundation for a relationship we can grow and nurture together.

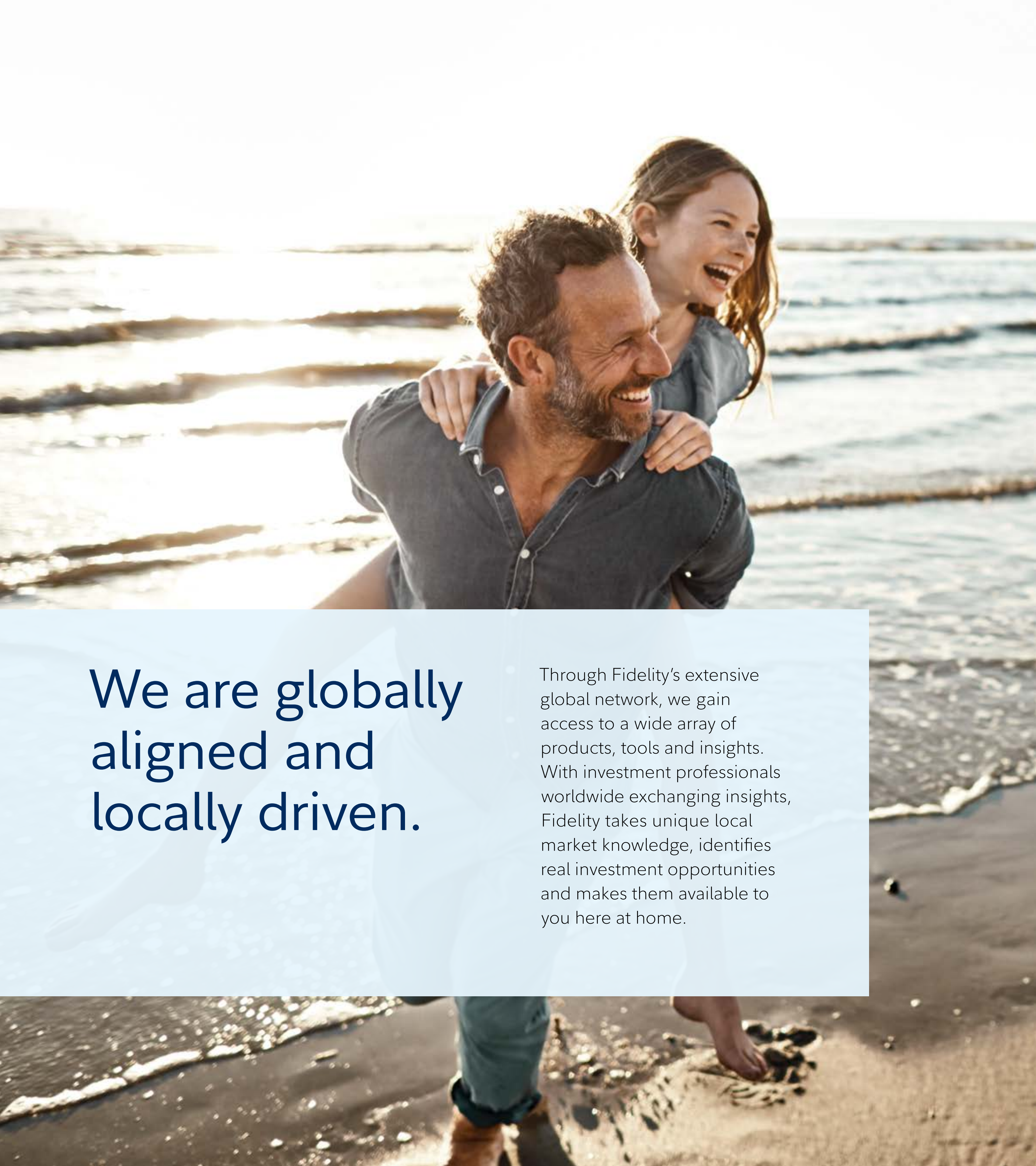
As a Fidelity Private Wealth client, your dedicated team will design a masterplan for your wealth.

We partner with you to understand and address your needs and wants, providing a tailored solution to help you achieve your long-term investment goals.

Helping you reach your financial goals is at the heart of what we do.

We take a long-term view with our plans and are not focused solely on short-term results.

Helping investors build better financial futures has always been at the core of our business. As a privately owned firm, we focus on what's best for you, our clients, not shareholders. We're invested in proprietary research, bottom-up fundamental analysis, product innovation and our people. Fidelity maintains the same beliefs and practices that have allowed it to grow and succeed: a culture of integrity, a commitment to performance and a dedication to clients.



We are globally aligned and locally driven.

Through Fidelity's extensive global network, we gain access to a wide array of products, tools and insights. With investment professionals worldwide exchanging insights, Fidelity takes unique local market knowledge, identifies real investment opportunities and makes them available to you here at home.

Integrated risk management system

Fidelity monitors portfolios constantly. Investment professionals monitor portfolio positions and weightings to ensure they are not only well thought out but are also appropriate to each product's investment mandate.

A commitment to performance

At Fidelity, we believe better research drives long-term performance. Building on fundamental, bottom-up research, we seek to create the competitive advantage and intelligent insight that's needed to deliver strong long-term returns for our clients.

Equity

Fidelity is known for stock picking, but investment professionals must also consider a portfolio's liquidity, volatility and overall composition. Fidelity constantly analyzes the risks that lie in the mix of sectors, currencies, regions and style factors, using various tools to keep them consistent with investment mandates.

Fixed income

Fidelity's 360-degree team-based approach to fixed income investing helps investment professionals gain insight into companies by combining views from both equity and credit research when making investment decisions for our clients – a key element in navigating broad and diverse market conditions.

A world of opportunity.

With Fidelity, you're getting access not just to one of Canada's leading investing teams but to a global network of research professionals and innovators.

Investment Professional Count of Subadvisors

		Founded in
Fidelity Investments	57	1987
Fidelity International	378	1969
Fidelity Investments	758	1946
GEODE Capital Management	35	2001

Fidelity Investments Canada ULC (FIC) brings a global network of investment expertise to Canadian investors. Our products are advised by our investment division, Fidelity Canada Investment Management, and subadvised by a variety of companies, as applicable, including Fidelity Management & Research Company LLC (FMR), FIAM LLC (FIAM), Fidelity Management & Research (Canada) ULC* (FMR-Canada), Fidelity International Limited (FIL Limited) and Geode Capital Management LLC (Geode). Investment professional counts include portfolio managers, research analysts and associates and traders only.

* Carrying on business in British Columbia as FMR Investments Canada ULC.

Source: FMR, FIAM, FIL Limited, FIC, FMR-Canada and Geode as at March 31, 2024. Data are unaudited. Figures for investment professionals do not include Division Management and Other Investment.

FIDELITY PRIVATE WEALTH

We're ready to help make your financial vision a reality.

It all starts with a conversation. Contact us for more information:
privatewealth@fidelity.ca

What to expect as a Fidelity Private Wealth client

- Dedicated relationship manager to attend to your needs.
- Guidance and tools to make informed investment decisions.
- Lifecycle planning to prepare you for milestone events.
- Tax-efficient strategies managed for your personal situation.
- Benefits for additional family members.
- Portfolio built on minimum asset threshold of $1 million.

Commissions, trailing commissions, management fees, brokerage fees and expenses may be associated with investments in mutual funds and ETFs. Please read the mutual fund's or ETF's prospectus, which contains detailed investment information, before investing. Mutual funds and ETFs are not guaranteed. Their values change frequently, and investors may experience a gain or a loss. Past performance may not be repeated.

Fidelity Private Wealth is a part of Fidelity Investments Canada ULC (FIC) providing private wealth management products and services. Not all services are offered by FIC. Custodial services are offered through Fidelity Canada Clearing ULC, an affiliate of FIC.

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