



## We are Aviso Correspondent Partners

Designed Securities Ltd. has partnered with Aviso Correspondent Partners to provide you with a wide range of financial services. Together, we're committed to helping you achieve long-term investment success.

**Strength. Stability. Security.**

**A full range of administration, trading, and reporting solutions.**

These are just some of the reasons your investment dealer has chosen Aviso Correspondent Partners as the carrying broker to help you reach your goals.

Aviso Correspondent Partners is part of Aviso Wealth, which administers and manages approximately \$100 billion in assets. We are owned by three of Canada's strongest and most highly regarded organizations:

**Desjardins Group**

\$445 billion in assets under administration, 7.5 million members and clients

**Credit Union Centrals**

\$273.8 billion in sector assets, 5.9 million members

**The Co-operators**

\$56.4 billion in assets under management

Based on publicly available sources accessed August 08, 2021.

Aviso Wealth has over 25 years of experience delivering wealth management solutions to more than 300 partners coast to coast. Now, in collaboration with Designed Securities Ltd., we are extending that legacy to you, so that you can achieve the financial well-being you deserve.

## Working together

Your investment dealer Designed Securities Ltd. provides you with sound financial advice, which may include wealth planning strategies; tax, trust and estate planning; and portfolio design, implementation, monitoring, and review.

Our job as carrying broker is to provide Designed Securities Ltd. with quality tools and resources, freeing up time for them to focus on all that's required to get you to your destination.

- Broad product offering, including stocks, bonds, mutual funds, foreign exchange, options, insurance and more
- Wide selection of cash investment alternatives to optimize your returns
- Administration for a full range of registered and non-registered accounts
- Access to a full-service capital markets trading desk
- Dependable custody services and safekeeping of your assets
- Secure data management to help protect your privacy
- Tax documentation
- Business tools and market research
- A commitment to innovation
- Priority access to a dedicated service team across Canada

## Regulatory overview

Aviso Correspondent Partners is a division of Credential Qtrade Securities Inc., part of Aviso Wealth Inc. Credential Qtrade Securities Inc. accounts are protected by the Canadian Investor Protection Fund. Credential Qtrade Securities Inc. is regulated by the Investment Industry Regulatory Organization of Canada, and is registered as an Investment Dealer with all provincial securities commissions.

Designed Securities Ltd. accounts are protected by the Canadian Investor Protection Fund and is regulated by the Investment Industry Regulatory Organization of Canada.



**With the added strength and stability of Aviso Correspondent Partners, you can feel confident Designed Securities Ltd. is well-positioned to meet your needs.**

Aviso Correspondent Partners is a division of Credential Qtrade Securities Inc., part of Aviso Wealth Inc. Aviso Wealth is a national, integrated financial services company with over 25 years of wealth management experience and approximately \$100 billion in assets under administration and management. Aviso Wealth offers correspondent and institutional services through Aviso Correspondent Partners, an independent provider of custody, trading and wealth services to portfolio managers, investment dealers, insurance companies and trust companies across Canada. Aviso Wealth is a wholly-owned subsidiary of Aviso Wealth LP, which in turn is owned 50% by Desjardins Financial Holding Inc. and 50% by a limited partnership owned by the five provincial Credit Union Centrals and the CUMIS Group Limited.