

Benefit & Pension Consultants Investment Consulting Services

COMPANY	Investment Consulting	Performance Measurement	Portfolio Modeling	Compliance Investment	Education & Comm.	Institutional Brokerage	Manager Search	Asset Allocation	Attribution Analysis	Policy Development	Risk Mgmt.	Transition Mgmt.	OTHER
ACQUAINT FINANCIAL					X								
AON CONSULTING INC.	X	X	X	X	X		X	X	X	X	X	X*	New Product Analysis, Governance Advice *Advise clients on transition mgmt. (i.e. help clients determine whether to involve a transition manager and, if so, who to select). Firm does not actually manage the transition.
API ASSET PERFORMANCE INC.	X	X	X	X	X		X	X	X	X	X		
BAYNES & WHITE INC.	X	X			X		X			X	X		
BENCOM FINANCIAL SERVICES GROUP INC.	X		X		X			X					
BENEFACT BENEFIT CONSULTANTS	X				X								
BENEFITS COMPANY, THE	X	X		X	X			X					
BFINANCE CANADA INC.	X				X		X	X	X				Firm is a manager search specialist. The other services listed are ancillary to firm's search practice.
BLEVINS INSURANCE GROUP	X	X			X		X	X	X	X			
BNY MELLON ASSET SERVICING	X	X		X			X	X	X		X		
BROCKHOUSE & COOPER INC.	X				X	X	X	X	X			X	Manager Monitoring Services
BUCK CONSULTANTS, AN ACS COMPANY	X	X	X	X	X		X	X	X	X	X	X	
C.P.M.S. COMPUTERIZED PORTFOLIO MANAGEMENT SERVICES INC.	X		X				X						
CAPCORP FINANCIAL CORP.	X				X					X			
CARTESIA	X	X		X	X		X			X	X		
CARTIN & ASSOCIATES	X	X	X	X	X		X	X		X			
CEM BENCHMARKING INC.		X											Performance and Cost Benchmarking for DB and DC Investment and Benefit Administration Operations
CG+B GROUP	X							X					
CINDY BOWDEN INSURANCE & BENEFITS	X												
CORPORATE BENEFIT ANALYSTS, INC.	X	X	X	X	X		X	X		X	X	X	
COUGHLIN & ASSOCIATES LTD.	X		X	X	X		X	X	X	X	X	X	

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D.A. TOWNLEY & ASSOCIATES LTD.	X	X	X	X	X		X	X	X	X	X		
DEMNER CONSULTING SERVICES LTD.		X			X		X						
DONALDSON VINCENT ASSOCIATES LIMITED	X	X	X	X	X		X	X	X	X			
ECKLER LTD.	X	X	X	X	X		X	X	X	X	X	X	
ESOP BUILDERS INC.													Employee Share Ownership Plans, Stock Option Plans, and Phantom Plans
FAIRFIELD WATSON & COMP.					X								
FINANCIAL EDUCATION INSTITUTE OF CANADA, THE	X		X		X							X	
GGA BENEFIT CONSULTANTS	X							X					
GLOBAL MANAGER RESEARCH (CANADIANMGRSEARCH)	X	X					X	X	X	X	X		
GOODEN & KERR ACTUARIES & RETIREMENT PLAN CONSULTANTS		X			X					X			
HEWITT ASSOCIATES	X	X	X	X	X		X	X	X	X	X	X	
INTEGRATIS BENEFIT SOLUTIONS INC.	X	X	X	X	X			X		X	X	X	
INVESTMENT GUILD, THE	X			X	X					X	X	X	
J&D BENEFITS INC.	X	X	X	X	X		X	X		X			
J.J. MCATEER & ASSOCIATES INCORPORATED		X		X	X		X			X			
JANTZI RESEARCH INC.	X		X	X	X		X		X	X	X		
JIM STODDARD INSURANCE AGENCIES LIMITED					X			X	X		X	X	
JOHNSON INC.	X	X	X	X			X	X	X	X	X		
JOHNSON SCHOCK LOWDEN INC.	X	X	X	X	X		X			X	X		
KPA ADVISORY SERVICES LTD.													Strategic Pension Fund Management
KRIEGER + ASSOCIATES		X		X	X		X			X	X	X	Governance
L.A. CLARK CONSULTING	X				X			X		X			
LEONG & ASSOCIATES ACTUARIES AND CONSULTANTS INC.	X	X		X			X	X	X	X			

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LESLIE GROUP LIMITED, THE	X	X		X	X		X	X		X	X	X	
M.A. REUTER BENEFITS INC.	X	X		X	X		X	X		X			
MANION, WILKINS & ASSOCIATES LTD.		X			X		X		X	X		X	
MATHEIS ASSOCIATES BENEFITS CONSULTANTS INC.	X	X	X	X	X		X	X		X	X	X	
MCFBEDARD GROUP INC.	X	X		X	X	X	X	X		X			
MERCER (CANADA) LIMITED	X	X	X	X	X		X	X	X	X	X	X	Investment Management Outsourcing, including Multi-manager Pooled Funds (\$21B globally); Investment Advisory Services; Investment Operational Service-rebalancing to Strategic Asset Mix, Cash Account Management, Performance Monitoring Reports, etc.
MITCHELL SANDHAM FINANCIAL SERVICES	X	X		X	X		X	X		X	X	X	
MORNEAU SOBECO	X	X	X	X	X		X	X	X	X	X		
PAL BENEFITS INC.	X	X	X	X	X		X	X	X	X			
PBAS GROUP, THE			X				X		X	X			
PENAD PENSION SERVICES LIMITED					X		X			X			Wealth Management Asset/Capital Accumulation and Retirement Planning through: Retiree Guidance Solutions, Price Global Advisors, Price Global Capital Management Inc. - Retiree Guidance Solutions Inc., Price Global Advisors, and Price Global Capital Management are Penad Global Alliance Partners.
PENMORE BENEFITS INC.	X	X	X	X	X			X	X		X		
PENSUL INC.	X	X	X	X	X		X	X	X	X	X	X	
PROTECTORS GROUP, THE					X					X	X	X	
PROTEUS PERFORMANCE MANAGEMENT INC.	X	X	X	X	X		X	X	X	X	X	X	Pension Governance, Foundation Governance, Retirement Planning Workshops/Seminars, Retirement Planning Counseling, Administration Review and Search, Executive Retirement Plans
RBC DEXIA INVESTOR SERVICES		X		X	X				X		X		



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RETIREMENT EDUCATION CENTRE INC., THE					X			X				X	
ROBERTSON, EADIE & ASSOCIATES LTD.		X		X			X			X			
RSM RICHTER											X		Audit and Accounting Services for all types of Pension Plans
RUSSELL INVESTMENTS CANADA LIMITED	X		X		X		X	X	X	X	X	X	Commission Recapture, FX Trade, Policy Implementation
SATANOVE & FLOOD CONSULTING LTD.	X	X	X	X	X		X	X	X	X	X	X	
SEGAL COMPANY, LTD., THE	X	X	X	X	X		X	X	X	X	X		
SELECTPATH BENEFITS & FINANCIAL INC.	X	X	X	X	X		X	X	X	X	X	X	
SIGURDSON, MCFADDEN & ASSOCIATES LTD.	X		X	X	X			X					
STEVEN COHEN INSURANCE AGENCY INC.				X	X		X	X		X			
STEVENSON AND HUNT INSURANCE BROKERS LTD.	X		X					X			X		Life Insurance, Critical Illness Coverage, Disability Coverage
SYNERGY BENEFITS CONSULTING INC.	X	X			X		X	X		X	X		
T.E. WEALTH (T.E. INVESTMENT COUNSEL)	X	X	X	X	X		X	X	X	X	X	X	Corporate Governance
TOWERS PERRIN	X	X	X	X	X	X	X	X	X	X	X	X	
TRG GROUP	X		X	X	X	X	X	X	X	X	X	X	
TWIST FINANCIAL CORP.	X		X		X					X	X		Firm has expertise in Fixed Income and offers Strategic Consulting in all areas related to the Bond Market, including ABCP, Securitization, Credit Markets, Liability-driven Investing, Risk Management, etc.
WATSON WYATT WORLDWIDE	X	X	X	X	X		X	X	X	X	X	X	Governance Training and Consulting Services, Defined Benefit and Defined Contribution Consulting Services
WESTERN COMPENSATION & BENEFITS CONSULTANTS	X	X	X	X	X		X	X	X	X	X	X	Asset-liability Modeling, Asset-liability Management
WHYNOT HOLDINGS - BENEFIT ADVISORS	X		X		X		X	X		X		X	



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WIEGERS BENEFITS	X	X			X			X		X	X	X	
WORKPLACE PENSION	X	X		X	X	X	X				X		Concentrated in CAP Guideline Compliance Management Processes