



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
A.W. SCHREIBER BENEFIT CONSULTANTS LTD.													
ACQUAINT FINANCIAL INC.													Consulting and Implementation for Group Retirement Plan Education through Seminars, Online, One-on-one, and Telephonically; services include Review of Current Financial Education and Communication Plan, Needs and Gap Analysis, Plan Revision, Implementation, and Monitoring to ensure maximum employee engagement; solutions include Transition, Downsizing, Plan Conversions, Early Retirement Offers, and so on.
ACTUARIAL SOLUTIONS INC.													
ACTUBEN CONSULTING INC.													
ADVISORY CAPITAL GROUP	X	X	X	X	X		X	X	X	X	X		Pension Governance
AON CONSULTING INC.	X	X	X	X	X		X	X	X	X	X	X	New Product Analysis, Governance Advice, Financial Risk – The firm advises clients on Transition Management (i.e. helps clients determine whether to involve a transition manager, and if so, who to select) and does not actually manage the transition.
API ASSET PERFORMANCE INC.	X	X	X	X	X		X	X	X	X	X		Value at Risk, Pooled Fund Report
ASPIRIA CORPORATION													
ASSOCIATED SLEEP SERVICES													
AUTOMATED ADMINISTRATION SERVICES INC.													
AVALON ACTUARIAL INC.	X	X		X	X		X	X		X	X	X	
BAYNES & WHITE	X	X			X		X			X	X	X	
BELTON FINANCIAL SERVICES LTD.	X	X			X	X		X		X		X	Socially Responsible Investing (SRI)
BENCOM FINANCIAL SERVICES GROUP INC.	X		X		X			X					
BENEFACT BENEFIT CONSULTANTS	X				X					X			
BENEFIT PARTNERS INC.	X	X	X	X	X	X	X	X	X	X	X	X	
BENEFIT SOURCE, THE	X						X						



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FSEAP – FAMILY SERVICES EMPLOYEE ASSISTANCE PROGRAMS													
GEM FINANCIAL GROUP	X	X	X		X	X	X	X				X	
GLOBAL INVESTMENT SOLUTIONS	X	X	X				X	X	X	X			Quarterly Governance Service
GOODEN & KERR ACTUARIES AND RETIREMENT PLAN CONSULTANTS		X			X					X			
GPS CONSULTING GROUP & INSURANCE AGENCIES (2006) INC., THE													
GROUP MEDICAL SERVICES													
GROUPSOURCE													
H3 CONSULTING / BUSINESSHEALTH													
HART ACTUARIAL CONSULTING LTD.													
HEALTHSOURCE PLUS													
HEWITT ASSOCIATES HUMAN SOLUTIONS	X	X		X	X		X	X	X	X	X	X	
IDEAL BENEFITS	X	X			X			X			X		
INTEGRATIS BENEFIT SOLUTIONS													
J&D BENEFITS INC.	X	X	X	X	X			X		X			
J.J. MCATEER & ASSOCIATES INCORPORATED		X		X	X		X			X			
JANTZI RESEARCH INC.													The firm provides a range of Environmental, Social, and Governance Investment Research, ranging from Global Company Coverage to Specialized Sector Reports. Research products include Canadian Social Investment Database, Specialized Research, Sector and Issue Reports, PortfolioEdge Builder, PortfolioEdge Audit, Universe Customization and Monitoring (UCaM), and Portfolio Benchmarks Services.



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JARVIS & ASSOCIATES	X				X								
JIM STODDARD INSURANCE AGENCIES LIMITED	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		
JOHNSTON GROUP INC.													
KING BENEFITS CONSULTING INC.	X				X								
KPA ADVISORY SERVICES LTD.													
KRIEGER + ASSOCIATES		X		X	X		X			X	X	X	Governance
LESLIE GROUP LIMITED, THE	X	X		X	X		X	X		X	X	X	
LIFE BENEFIT SOLUTIONS INC.													
LONGHURST & JACK INC.													
LYNMAR ASSOCIATES LTD.													
M.A. REUTER BENEFITS	X	X		X	X								
MAGNUS CONSULTING SERVICES													
MANION, WILKINS & ASSOCIATES LTD.		X		X	X		X	X	X	X		X	
MATHEIS TEAM FINANCIAL	X	X	X	X	X		X	X		X	X	X	
MCFBEDARD GROUP INC.	X	X		X	X	X	X	X		X			
MDM INSURANCE SERVICES INC.													
MEDIDIRECT INC.													
MERCER (CANADA) LIMITED	X	X	X	X	X		X	X	X	X	X	X	Investment Management Outsourcing including Multi-manager Pooled Funds; Investment Advisory Services; Investment Operational Service-rebalancing to Strategic Asset Mix, Cash Assout Management, Performance Monitoring Reports, etc.
MITCHELL SANDHAM FINANCIAL SERVICES	X	X		X	X		X	X		X	X	X	



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MORNEAU SOBECO	X	X	X	X	X		X	X	X	X	X		
MORNINGSTAR	X	X	X				X	X	X		X		
MORROW, CROSSDALE & ASSOCIATES INC.	X				X								
MOSEY & MOSEY BENEFIT PLAN CONSULTANTS													
NEXGENRX INC.													
ORGANIZATIONAL HEALTH INCORPORATED (OHI)													
ORGANIZATIONAL SOLUTIONS INC.													
PAL BENEFITS INC.	X	X	X	X	X		X	X	X	X			
PARK RE CANADA													
PBAS GROUP, THE		X	X				X		X	X			
PBI ACTUARIAL CONSULTANTS LTD.	X	X	X	X	X		X	X	X	X	X		Specialists in Liability-driven Investment Strategies with Cash Flow Matching Fixed Income Portfolios and Portable Alpha Overlay Strategies, as well as Alternative Assets (Real Estate, Hedge Funds, Infrastructure)
PBL BENEFITS LIMITED	X	X	X	X	X		X	X		X	X	X	
PENAD PENSION SERVICES LTD.					X		X			X			The firm provides Group, as well as Individual Wealth Management and Retirement Advisory Services through Price Global Capital Management Inc.* and RetireeGuidance Retirement Income Solutions Ltd.* (*Members of the Penad Global Alliance Partnership)
PENMORE BENEFITS INC.	X	X	X	X	X			X	X		X		
PENSAC ASSOCIATES													
PENSUL INC.	X	X	X	X	X		X	X	X	X	X	X	
POINTBREAK CONSULTING LTD.													
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



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SYNERGY BENEFITS CONSULTING INC.													
T.E. INVESTMENT COUNSEL INC.	X	X	X	X	X		X	X	X	X	X		
T.I. HULL BENEFIT CONSULTANTS CORP.													
TOWERS PERRIN	X	X	X	X	X		X	X	X	X	X	X	
TRI FIT INC.													
TRIHEY ASSOCIATES LIMITED													
TWIST FINANCIAL CORP.	X		X		X					X	X		The firm offers Consulting and Board Education in all areas related to Pension Management, including Liability-driven Investing Strategies, Derivatives, Setting Objectives, Benchmarks, Mandates, and Monitoring Policies. Strategy and Education is tailored to the specific needs of each client. The firm also offers Litigation Support and Expert Witness Testimony.
VICTOR B. TUBA & ASSOC.													
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, Alternatives Research and Consulting
WESTERN COMPENSATION & BENEFITS CONSULTANTS	X	X	X	X	X		X	X	X	X	X	X	Asset-Liability Modeling, Asset-Liability Management
WHITE WILLOW BENEFIT CONSULTANTS INCORPORATED, A DIVISION OF GROUPWORKS FINANCIAL CORP.													
WHYNOT HOLDINGS – BENEFIT ADVISORS	X		X										
WIEGERS BENEFITS/WIEGERS FINANCIAL	X	X			X			X		X	X	X	Coaching of Professionals Personally and Corporately
WINCH GROUP INC., THE	X	X			X	X	X	X			X		
WORKPLACE PENSION SOLUTIONS (CANADA) INC.	X	X		X	X	X	X					X	Concentrated in CAP Guideline Compliance Management processes