



What Our Advisors Say

Who We Are

Partners In Planning is the financial services partner of choice for independent and professional Advisors. We are a growing national company and a leader in the financial services industry, driven by integrity and inspired by independence. Our goal is to provide service excellence to a select group of professional Advisors and their clients, while maintaining industry leading compliance and corporate governance standards.

A Solid History

For almost 25 years, Partners In Planning has operated under the values of integrity, independence, respect and professionalism. These values are the building blocks of our business, and what attracts quality Advisors to our dealership. Today, PIP has evolved into one of Canada's largest privately-held dealer services organizations with more than 500 mutual fund and licensed insurance Advisors in almost 200 locations, with approximately \$4 billion in managed assets and more than 60,000 clients.

Partners Today

Partners In Planning Financial Services Ltd. is one of Canada's largest national independent mutual fund dealers, with one of Canada's largest networks of independent Financial Advisors, offering a full range of mutual funds and money products, quality exempt product offerings and, through referral arrangements with other financial institutions, stocks, bonds, mortgages, debt instruments and private investment counseling. Through Partners In Planning Insurance Services Inc., insurance agents and clients can access a full range of life, disability and critical illness insurance products and segregated funds.

Strong Parent Company

Operating within the Walton Group of Companies, PIP is backed by one of North America's leading land-based real estate investment groups. Over the past 30 years, Walton firms have acquired more than 52,400 acres of quality land strategically located in the development path of some of North America's leading urban growth areas. Walton companies are innovative leaders and have to date syndicated over USD \$2.1 billion of land (CAD \$2.4 billion) in North America with over 61,300 investors worldwide.

What Our Advisors Say

Partners In Planning is committed to help Advisors succeed and provide a variety of value added services and support so that they can focus on managing their business and servicing their clients.

Following is what some Advisors have said about Partners In Planning and how we rate in five key areas:

- Compliance / Corporate Governance
- Management / Leadership
- Product Review and Offering
- Independence and Advisor Partnership
- Operations and Advisor Services

Compliance / Corporate Governance



"High ethical standards are what attracted me to join Partners In Planning. As a producing Representative and Branch Manager, I have witnessed good corporate governance and strong compliance consistently embraced at all levels of PIP."

Carol Tichelman, Chilliwack, British Columbia



"Compliance was always of utmost importance in our previous dealership. When PIP acquired us, we were pleased to observe they kept compliance as a major governing principle. We applaud their belief and insistence on maintaining high qualification standards of their Advisors."

Eric Marsolais, Dorval, Quebec

Management / Leadership



"We were very excited when Partners In Planning came under the ownership of the Doherty family and leadership of Bill Doherty. They brought energy, financial resources and a fresh focus to many of our priorities including a new operating platform and experienced professional management. We can now literally pick up the phone and speak directly to people who understand our concerns and work to resolve any issues. Their dedication to customer service and innovation promises to keep us moving forward in our efforts to provide outstanding service to our clients."

Gary R. Huston, Vernon, British Columbia



"My first meeting with the current leadership of PIP, was requested by them. The purpose was to ask my opinion of what I required from them to implement in order to make myself and PIP more successful. I brought forth a number of issues, including some large structural initiatives. All were dealt with and resolved in a timely and professional manner. You can't ask for much more than that – leadership that listens and acts."

Paul Mowbray, Etobicoke, Ontario



"I have been with PIP since 2000 and believe it to be the best dealer around. PIP allows its Advisors to work with their clients without interference or direction to sell any particular product. This allows us to work with clients' best interests in mind. The Head Office staff is exceptional and the service responses are efficient. I would highly recommend PIP to any Advisor thinking of moving dealerships."

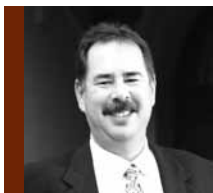
Marc St. Arneault, Prince George, British Columbia

Product Review and Offering



"What I find particularly attractive being with Partners In Planning is that I have been provided the opportunity to participate as a stakeholder in the dealership and overall organization. Having recently joined the Product Review Committee and being able to participate in the H2H Advisor Sessions makes me feel positive about the firm's desire to include advisors. The dealership's Advisor Services staff are true partners in settling my clients business. The MGA staff has the broadest insurance knowledge I've experienced in my 20 years."

Brett Worby, Georgetown, Ontario



"I have been with Partners In Planning since 1995 and have been very impressed with how it seeks the involvement of its Advisors. Just recently I was asked to join the Product Review Committee. It's important to get Advisor input on the products the dealers put on their shelves thereby balancing the need to provide innovative financial products to our clients while at the same time safeguarding their interests."

Rob McKenzie, Calgary, Alberta

Independence and Advisor Partnership



"Since the recent reorganization of PIP, I have been very impressed with the rapid improvements in technology, back office support and MGA services. For the independent minded Advisor, I can say without hesitation, PIP has developed an outstanding platform that provides excellent compensation, timely responsiveness and most importantly, the opportunity to build your business in a collegial environment. In short, the new PIP is a great place to be."

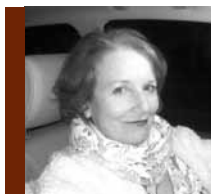
Ed MacDermaid, Bathurst, New Brunswick



"My transition over to Partners In Planning was wonderfully smooth. It feels like 300 pounds has been taken off of my back. It is great to work with a dealer that wants to work with me and my business rather than have me work for them. I particularly like the fact that I'm given the freedom and independence to put my clients into the best products suited to their needs rather than being told I must only use the dealer's in-house products."

Bruce Pound, Camrose, Alberta

Operations and Advisor Services



"I am very pleased with the outstanding support that I have received over the past five years from Partners In Planning. Each needed item promised by PIP has been delivered before the deadline and has exceeded my expectations. As an independent veteran in the financial planning business, I like the solid presence, the coast-to-coast support and the integrity and quality of the PIP head office and regional teams."

Lise Allin, Belleville, Ontario



"I have been in the financial planning industry for 22 years; the past seven years have been with Partners In Planning. Operations and Advisor Services were very helpful with transitioning my business from my previous dealer and made sure everything went smoothly. They are always friendly and very helpful with any questions or problems that we may have and present timely solutions."

Rick Kolla, Saskatoon, Saskatchewan



Contact Us

Contact us today to talk about your future with Partners In Planning.

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