



## Partnering with Financial Advisors

Barometer partners with select investment advisors across the country, bringing them a unique investment solution through our suite of private pools and prospectus fund offerings. Investment strategies range from core tactical income and equity to global macro mandates, providing advisors with the tools they need to achieve their clients' investment objectives. Barometer has a history of building strong relationships with advisors and providing them with new business initiatives, while supporting them with exceptional service and communication. Having a history rooted within the dealer network, we have a great understanding of the needs of advisors and firmly believe in the value that they bring to Canadian investors. Our work, together with advisors, has helped grow our investment mandates to approximately \$2.0 billion under management\*.

### WHY ADVISORS CHOOSE TO WORK WITH US

- We are transparent. Barometer provides timely and relevant communication, including weekly holdings, portfolio commentary, webinars and ad hoc meetings.
- We have a knowledgeable senior Business Development Team. Barometer's team will explain our current portfolios' positions and the current market conditions in a clear and concise manner.
- We have an accessible Portfolio Management Team. Barometer's portfolio managers are available to both advisors and their clients for presentations and updates.
- We have a track record of helping advisors win business. Barometer's determination to assist advisors in prospecting through joint meetings and seminars helps in the successful close of high-net-worth clients.
- We maintain a strong brand identity. Barometer's senior portfolio managers have regular spots on BNN and are active in social media.
- We have a unique investment strategy. Barometer's product offering provides both a unique investment solution for advisors and an effective complement to their clients' existing portfolios.

### OUR APPROACH

Barometer's investment approach is truly unique and differentiates us in the marketplace. Barometer has consistently demonstrated its ability to add value in different market conditions and economic cycles. Our Disciplined Leadership Approach™ places particular emphasis on capital preservation, while delivering long-term absolute returns.

### WHAT DIFFERENTIATES US

**Tactical** ▪ **Style Agnostic** ▪ **Use of Cash** ▪ **Stop/Loss Alerts** ▪ **Daily Pricing** ▪ **Daily Liquidity** ▪ **FundSERV**

Please contact our Business Development Team for an introduction to Barometer.

[www.barometercapital.ca](http://www.barometercapital.ca)

*\*Assets under management includes separately managed client accounts, Barometer Private Pools, the Barometer Group of Funds and investment advisory services to broker/dealers via an investment management platform as at March 31, 2018.*