ECHELON
WEALTH PARTNERS

Exceptional Client Service

We’ve built our reputation on personal relationships. We know our clients as people – individuals with concerns and goals unique to them.

What We Do For You

Our advisors serve Canadians across the country, through specialized teams or as individuals, and they rely on access to experts to help them champion on behalf of their clients in meeting their complete financial needs.

Their portfolio recommendations begin with Echelon’s best-in-class research and a comprehensive investment selection, including large, mid and small cap equities encompassing all sectors of the marketplace as well as new issues and private placements. Whether it’s investment planning, retirement and estate planning or insurance planning, the result is a portfolio best suited and tailored to each investor’s needs.

As professionals, Echelon Wealth’s advisors take seriously their responsibilities for the growth of the portfolio, and the protection of the assets that clients have accumulated. Our investment advisors are proactive, and consider many financial planning factors to allow their clients to attain the maximum growth on their investments.

The Echelon Difference

We build meaningful, life-long relationships with our clients and work in partnership with them to build and preserve their wealth.

We have a diverse group of approximately 100 investment advisors and portfolio managers offering high-quality service for individuals, households, institutions and corporations. Our goal is to work in partnership with our clients to help them preserve and increase their wealth through flexible, customized investment solutions. Our bench strength also includes capital markets professionals with deep expertise in investment banking, research, corporate finance and institutional trading. Our executive team is led by independent brokerage industry veterans who provide Echelon with a strong vision and leadership.

Time has proven that those organizations that look after their clients well are those that prosper.

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Independence

Our aim is to become Canada's leading independent investment firm. We will do this by building lifetime relationships with our clients and delivering superior service. We give our financial professionals the freedom to offer truly independent investment advice, always putting their clients' needs first. Our entrepreneurial approach and client-first attitude helps us deliver high-quality wealth management solutions that exceed our clients' expectations. We are also a growing firm, with more than $4 billion in assets under administration and management. We service clients from our offices in Toronto, Ottawa, Montreal, Calgary, Vancouver, Victoria and Tokyo.

People

The greatest strength of our firm is our people. We have approximately 100 investment advisors and portfolio managers across Canada, supported by over 100 staff with expertise in compliance, technology and administration. They work in an independent, collaborative environment, providing clients with the superior advice and results with giudance from some of the most experienced professionals in the industry. Our team has the freedom to offer truly independent investment advice, while ensuring our clients' expectations are not only met, but surpassed.

Operational Excellence

At Echelon, we know that confidentiality, security of information and account accessibility are important to investors. Our clients can rest assured that when they use our state-of-the art platform, they will benefit from responsive, user-friendly technology and that their information is secured by a robust technical infrastructure. And, of course, your advisor is always available to discuss your investment holdings and answer any questions you may have. Each transaction is cleared through Fidelity Clearing Canada, which along with Royal Trust Company, serve as our custodians and are subject to regular independently conducted audits.

Safety of Assets

Echelon Wealth Partners is a member of both the Investment Industry Regulatory Organization of Canada (IIROC) and the Canadian Investor Protection Fund (CIPF). CIPF offers the clients of member firms added piece of mind as they guarantee each client account up to $1 million in the unlikely event of a firm insolvency. They also provide a separate $1 million for registered retirement accounts (RRSP, RRIF, LIRA and LIF). All non-registered securities and cash balances are held secure at our custodian Fidelity Clearing Canada ULC (Fidelity has over $3 trillion in custody globally) while registered account securities and cash balances are held by our custodian Royal Trust Company (a subsidiary of the Royal Bank of Canada).

Wealth Preservation

Echelon Wealth Preservation is home to life-licensed advisors who are experts in delivering comprehensive wealth planning. We provide clients with access to best in class Canadian life insurance products*. Following an extensive review of your current personal and financial situation, our experienced advisors can provide you with the right solutions to meet your personal and financial goals. Our advisors can design a risk management plan that takes into consideration your retirement, tax and estate planning needs.

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