

Assante Wealth Management Achieves Top Ranking in J.D. Power 2021 Canada Full-Service Investor Satisfaction Study

Assante also ranks first in trust among full-service investment firms

TORONTO (May 27, 2021) – Assante Wealth Management (“Assante”) announces that it has been ranked highest in overall investor satisfaction with full-service investment firms in the J.D. Power 2021 Canada Full-Service Investor Satisfaction Study, including ranking first in trust.

“The J.D. Power study is a credible and unbiased look at the investor experience and these results represent a resounding vote of confidence from our clients,” said Sean Etherington, President of Assante. “We take pride in the proficiency of Assante’s advisor teams and our shared dedication to providing clients with a complete approach to wealth management that addresses all aspects of their financial lives and goals.”

“In 2020, Assante and its advisors tackled the challenges of the pandemic head on, maintaining an impressive level of service to clients and accelerating the adoption of a series of digital tools,” said Kurt MacAlpine, Chief Executive Officer of CI Financial Corp., Assante’s parent company. “We remain committed to enhancing our support for Assante advisors and clients and to building the most client-focused wealth management firm in Canada.”

These results continue the high rankings earned by Assante as it ranked second-highest in the J.D. Power Canada Full-Service Investor Satisfaction Studies every year from 2017 to 2020.

The Canada Full-Service Investor Satisfaction Study measures overall investor satisfaction with full-service investment firms in seven factors (in order of importance): people; trust; products and services; value for fees; ability to manage wealth how and when I want; problem resolution; and digital channels. The study is based on responses from 3,577 investors who make some or all of their investment decisions with a financial advisor. The study was fielded from December 2020 through February 2021.

About J.D. Power

J.D. Power is a global leader in consumer insights, advisory services and data and analytics. A pioneer in the use of big data, artificial intelligence (AI) and algorithmic modelling capabilities to understand consumer behaviour, J.D. Power has been delivering incisive industry intelligence on customer interactions with brands and products for more than 50 years. The world's leading businesses across major industries rely on J.D. Power to guide their customer-facing strategies. J.D. Power is headquartered in Troy, Mich., and has offices in North America, Europe and Asia Pacific. To learn more about the company’s business offerings, visit JDPower.com/business.



T: 416.364.1145 | 1.800.268.9374
2 Queen St. East, Twentieth Floor, Toronto, Ontario M5C 3G7 | assante.com

About Assante Wealth Management

Founded in 1995, Assante Wealth Management is one of Canada's largest firms providing wealth management solutions. Assante's 900 professional advisors, located in communities throughout the country, have approximately \$53 billion of Canadians' family wealth under their care (as of April 30, 2021). Assante is a subsidiary of [CI Financial Corp.](http://www.cifinancial.com) (TSX: CIX, NYSE: CIXX). For more information, visit www.assante.com.

Contacts:

Murray Oxby
Vice-President, Communications
416-681-3254
moxby@assante.com