

Bundling Program

Our **Bundling Program** allows you to combine different account types and asset types (RRSPs, TFSAs, RESPs and GICs) to obtain the lower advisory fee charged at the higher tiers. In addition to saving money on advisory fees, you also benefit from consolidating and streamlining your asset management within a cohesive personal financial plan. Below is an example of how you can benefit from the bundling option.

Bundling Pricing Option		
Account Type	Portfolio Size	Advisory Fee*
Signature Service Account	\$250,000.00	1.25% of AUA first \$100,000 1.00% of AUA next \$150,000
Additional Accounts	Bundled Portfolio Size	Advisory Fee
RRSP	\$150,000	1.25% of AUA first \$100,000 1.00% of AUA next \$150,000
TFSAs	\$25,000	1.25% of AUA first \$100,000
RESP	\$125,000	1.25% of AUA first \$100,000 1.00% of AUA next \$150,000
Additional Assets	Bundled Portfolio Size	Advisory Fee
GIC's	\$50,000	1.25% of AUA first \$100,000
Entity Account	\$50,000	1.25% of AUA first \$100,000
Other	\$125,000.00	1.25% of AUA first \$100,000 1.00% of AUA next \$150,000
Total Assets	\$775,000.00	0.75%* of AUA

* Please refer to the GP Wealth Signature Service Advisory Fee Schedule for complete details.

Grouping other eligible accounts

Family grouping is available as part of our Family Pricing Program. The rules are flexible and allow for different combinations of family members to be grouped under the primary account holder. The family group can be any combination of:

- (a) Spouse, including common-law partner
- (b) Children and their spouses.

Speak to your Financial Advisor to learn more about our Signature Service Account

