

Family Pricing Program

With our Family Pricing Program, you, your spouse and other family members can combine the value of your assets under management for the purpose of calculating a reduced annual advisory fee. In this way, everyone benefits from the lower fees that apply to larger investments in accordance with our tiered fee structure. And it provides the framework to develop a cohesive estate planning process for your entire family. Below is an example of how you can benefit from the family pricing option.

Family Pricing Option Illustration			
Client/Family Member	Portfolio Size	Pricing Category	Advisory Fee*
Client/Spouse	\$400,000.00	Household Pricing	1.00%
Parents/Children	\$550,000.00	Extended Family Pricing	0.75%
Business Entity	\$200,000.00	Add Entities (Corporation/Partnership/Trust)	1.00%
Total Assets	\$1,150,000.00	All Members Receive Tier 4 Pricing	0.50%

*Please refer to the GP Wealth Signature Service Advisory Fee Schedule

Building a family group

Family grouping 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.

Grouping other eligible accounts

It's also possible to group other types of accounts:

- (a) Joint Accounts: Any joint account where any of the family members can be identified as beneficial owners can participate
- (b) Corporate Accounts: Any family members who are beneficial owners of greater than 50% of the voting equity can also participate.

**Speak to your financial advisor to learn more about our
Signature Service Account**

