

# Institutional Services

We are pleased to introduce our new, one-stop solution for wealth management. No matter which Laurentian Bank entity you are currently working with, you can now take advantage of all of our investment management products and solutions to ensure you can remain competitive. Whether it's centralized expertise or integrated products and services, as your partner, we can help you accelerate growth and round out your offering.



## Program information

In addition to a wide range of channels, products and services, we offer cost reductions for you and your clients.



## Available channels

- MFDA
- AMF
- Portfolio Managers
- IIROC
- Retail clients



## Services, accounts & fee options

- Carrying dealer services
- Available accounts:**
- Registered, non-registered, tax-free savings accounts, group plans
- Pricing account options:**
- Account fees, fee for service



## Trading & underwriting

- Institutional equity trading
- Investment banking
- Government and corporate underwriting
- ETF trading (MFDA/AMF)
- Discount Brokerage services



## Other

- Portfolio management solutions
- Bare trustee services
- Economic research
- Advisor/investor web portals

## Reduce costs for you and your clients

- **Portfolio Manager Transition Service** offers a seamless transfer of accounts between B2B Bank Dealer Services and Laurentian Bank Securities (for MFDA/AMF dealers/advisors transitioning to portfolio manager) at no cost to you. In addition, it allows you to lean on our experience as you evolve your business. Our knowledgeable team of subject matter experts, our existing relationships with regulators and standardized approach can guide you through the process to becoming a Portfolio Manager.
- **Transfer-in Program** offers financial incentives of up to \$175 per account to transition to B2B Bank Dealer Services.

If you're interested in partnering with Laurentian Bank for a more streamlined and successful practice, please contact:



### Fernando Moleirinho, CIM, FCSI

Vice President, Business Development,  
Institutional Services - Dealer Services

#### Laurentian Bank Securities

MoleirinhoF@lb-securities.ca

Office: 416-941-7716 Mobile: 416-553-5275

B2B Bank Dealer Services includes B2B Bank Financial Services Inc. (Member of the Mutual Fund Dealers Association of Canada (MFDA)), B2B Bank Securities Services Inc. (an IIROC member, Member - Canadian Investor Protection Fund) and B2B Bank Intermediary Services Inc. (an AMF - regulated dealer operating in Quebec). B2B Bank Dealer Services does not endorse or promote any investments products, programs and strategies. This document is intended for licensed financial advisors exclusively and is for information purposes only. B2B Bank is a trademark under license.

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