



# Guardian Pro Services

Tailored Solutions for Athletes

# Guardian Capital Group Limited

EST. 1962

TSX LISTED: GCG, GCG.A

**350+**

Company Associates<sup>1</sup>

**1000+**

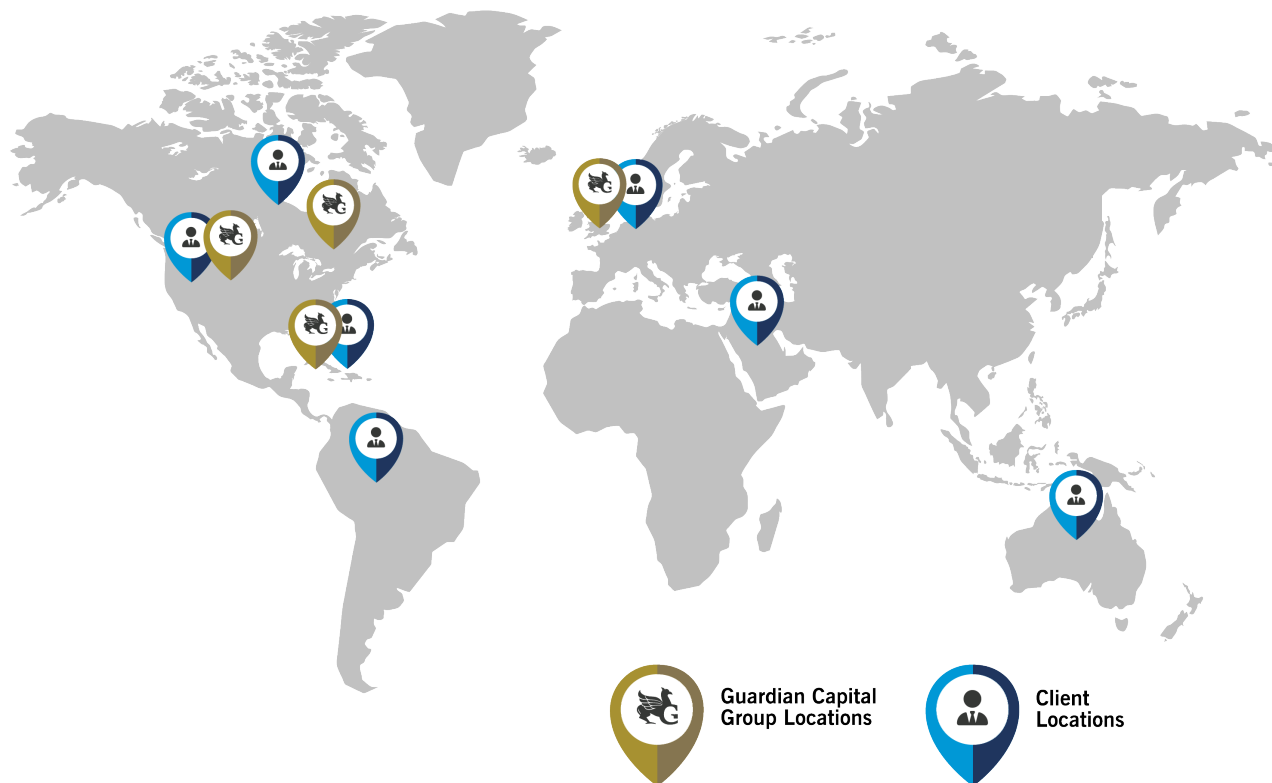
Private Wealth Relationships<sup>2</sup>

**400+**

Institutional Relationships<sup>3</sup>

**1000+**

Retail Intermediary Relationships<sup>3</sup>



<sup>1</sup>Company Associates includes all subsidiaries of Guardian Capital Group Limited as of June 2024.

<sup>2</sup>Clients included are for Alta Capital Management LLC, Agincourt Capital Management LLC and Guardian Capital Advisors LP as of June 2024.

<sup>3</sup>Relationships included are for Guardian Capital LP, Alta Capital Management LLC, Agincourt Capital Management LLC as of June 2024.



# Global Wealth Solutions






**\$58.6B<sup>1</sup>**

**Guardian Capital  
Group Limited<sup>1</sup>**

## Investment Management

-  **Guardian Capital LP**  
Institutional Investment Management
-  **GuardCap Asset Management Limited**  
Global Equity Institutional Asset Manager
-  **Alta Capital Management, LLC**  
Equity Institutional Asset Manager
-  **Agincourt Capital Management LLC**  
Fixed Income Institutional Asset Manager
-  **Guardian Capital Real Estate Inc.**  
Direct Investments in Canadian Real Estate
-  **Guardian Smart Infrastructure Management**  
Direct Private Investments in Global Infrastructure

## Wealth Management

-  **Guardian Partners Inc.**  
Ultra-High-Net-Worth, Foundations,  
Pensions
-  **Guardian Capital Advisors LP**  
Private Wealth Investment Counsellor
-  **Rae & Lipskie Investment Counsel Inc.**  
Private Wealth Manager
-  **Alexandria Bancorp Limited**  
International Wealth Management, Trust  
and Banking Services
-  **ModernAdvisor**  
Digital / Hybrid Advice

Definitions:  
Guardian Capital Group Limited ("Guardian")  
Guardian Capital LP ("GCLP")  
Guardian Partners Inc. (GPI)  
Guardian Capital Advisors LP ("GCA")

<sup>1</sup>Guardian: total client assets as of June 30, 2024, were \$58.6 billion, which include assets under management and assets under advisement. Additional details are provided in the most recent quarterly report to shareholders as of June 30, 2024.



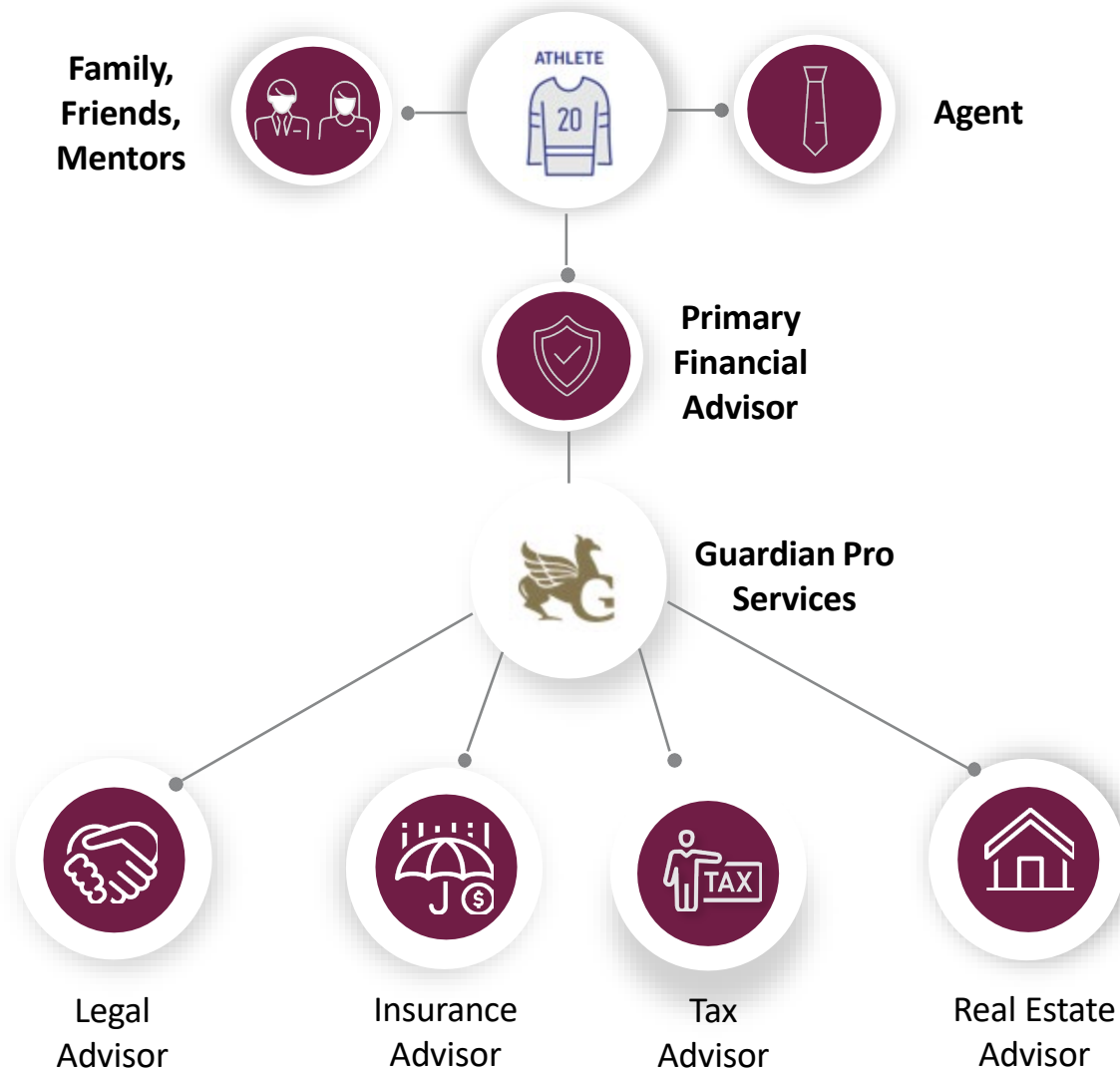
# A Winning Team

## Surround Yourself with Talent

For over 25 years, Guardian Capital Advisors LP has worked with clientele in the sports and entertainment industry.

The model in place is tried, tested and true to the best interests of clientele.

Working with best of breed external advisors instead of having them in-house, means there is an unbiased approach to who clients work with. If there are pre-existing relationships in place, we are happy to work with your network.



# Athletes, Coaches & Sports Industry Professionals

As a professional, your time is consumed with mastering your craft through training, planning, preparation, coaching, teaching, traveling, and sacrificing for your teams, your career, and most of all, for your family.

Do you have the time, or a trusted advisor that understands your business and how much you have put into it?

Making the right decisions can help create a “work optional” lifestyle following a professional career. This lifestyle allows individuals to pursue secondary careers, hobbies, and charitable causes driven by passions.

**Guardian collaborates with your team of advisors to tailor solutions which include:**

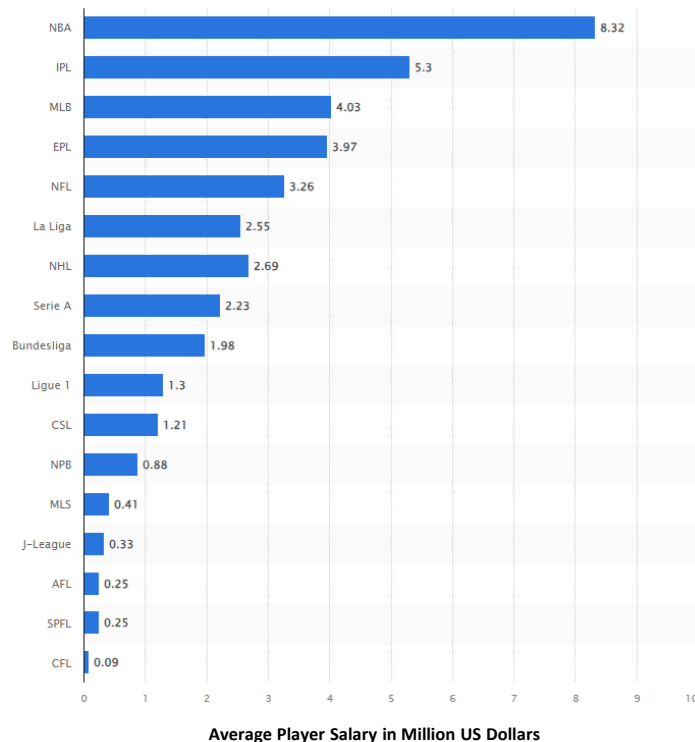
- Retirement Planning
- Investment Management
- Managing Expenses
- Cash Management Solutions
- Debt Management Solutions
- Charitable Endeavours
- Cross Border Planning
- Currency Exposure
- Generational Transfer of Wealth
- Estate & Legacy Planning



# Athlete Specific Challenges

The average professional athletic career is estimated to last between 3-4 years. Average will mean some careers last longer, but often they end sooner than anticipated due to injury. During this short window, an elite athlete will likely earn the bulk of their lifetime income and require it to fund 50+ years of retirement.

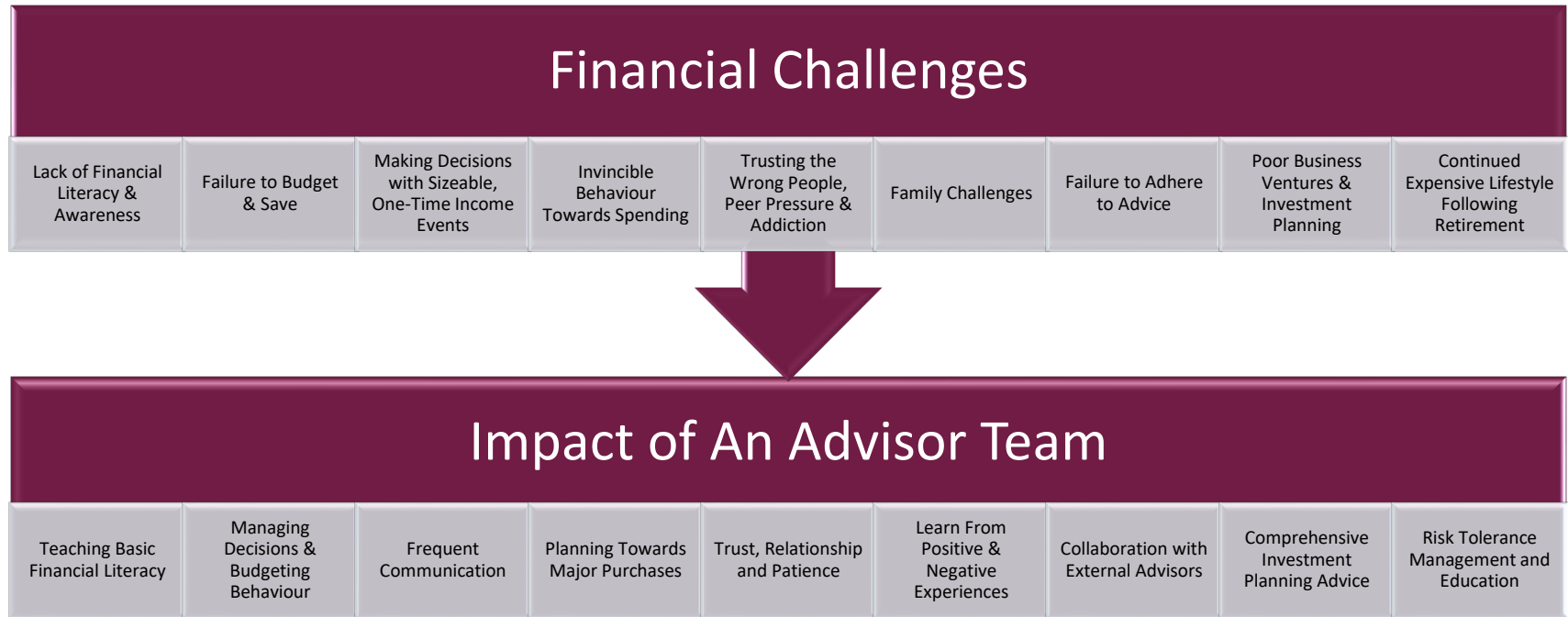
**Average Annual Player Salary in the Sports Industry in 2019 / 2020, by League**



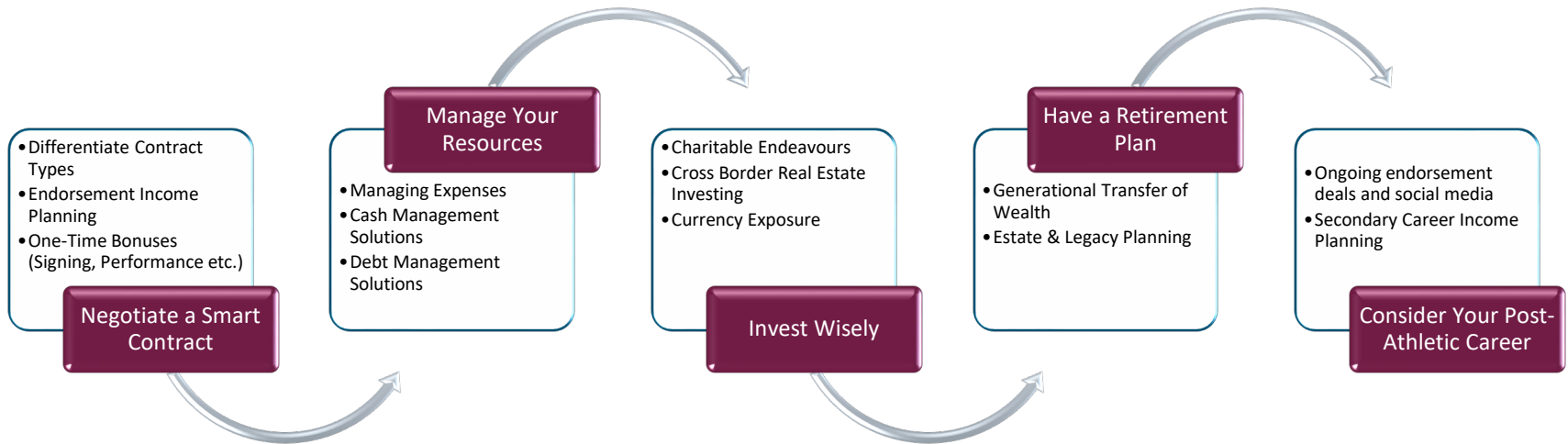
\* Source: Statistica Research Report



# The Need for Sound Advice



# How Guardian Can Help You



**Guardian is a boutique asset manager, with global capabilities and experience. Whether you are looking to invest your total portfolio, or a portion of it, Guardian has the right solution for you.**



# The Guardian Advantage

## Benefit of Guardian

Independent of banks

Guardian Capital LP is located in Canada and registered throughout most of the US

Experience over 25 years working with similar clientele

As a fiduciary, the highest standard of duty ensures your financial well-being is the centre of the investment strategy

## Impact on You

Unbiased with product selection

Ease of investing across borders

Highly skilled and savvy financial professionals working on your team

Trusted advice every step of the way



# Key Contacts

## PRESIDENT

### **Anthony Messina, CPA, CA, CFA**

Head of Private Wealth Management

[amessina@guardiancapital.com](mailto:amessina@guardiancapital.com)

## TORONTO

### **Andrew Dimock, CFA**

Vice President, Investment Counsellor

[adimock@guardiancapital.com](mailto:adimock@guardiancapital.com)

### **Errol Kuszner, CFA**

Vice President, Investment Counsellor

[ekuszner@guardiancapital.com](mailto:ekuszner@guardiancapital.com)

### **Kimberly Hu Amadori, CFA**

Vice President, Investment Counsellor

[khu@guardiancapital.com](mailto:khu@guardiancapital.com)

### **Erik Brandt, CFA, CIM**

Client Portfolio Manager

[ebandt@guardiancapital.com](mailto:ebandt@guardiancapital.com)

### **Matthew Baker, CFA, CMT, CIM, DMS**

Vice President & Portfolio Manager

[mbaker@guardiancapital.com](mailto:mbaker@guardiancapital.com)

### **Thierry Di Nallo, CFA**

Vice President & Portfolio Manager

[tdinallo@guardiancapital.com](mailto:tdinallo@guardiancapital.com)

## CALGARY

### **Steven Rowles, CFA**

Client Portfolio Manager

[srowles@guardiancapital.com](mailto:srowles@guardiancapital.com)

### **Sean Convey, CFA**

Client Portfolio Manager

[sconvey@guardiancapital.com](mailto:sconvey@guardiancapital.com)

## VANCOUVER

### **Michael Barkley, CFA, MBA**

Senior Vice President & Portfolio Manager

[mbarkley@guardiancapital.com](mailto:mbarkley@guardiancapital.com)

### **Mark Bodnar, CFA, CIM**

Client Portfolio Manager

[mbodnar@guardiancapital.com](mailto:mbodnar@guardiancapital.com)

### **Jessi Hilton, CFA**

Associate Client Portfolio Manager

[jhilton@guardiancapital.com](mailto:jhilton@guardiancapital.com)

### **Sasha Evans, CFA, CIM**

Associate Client Portfolio Manager

[sevens@guardiancapital.com](mailto:sevens@guardiancapital.com)





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