

Dundee Summit Advisory Account Service

Dundee Summit is a service that combines a portfolio approach to investing with insightful advice from your Dundee Advisor and a simple asset-based fee that lets you maintain control over your investment decisions.¹ Your Dundee Advisor will work closely with you to create a truly personalized investment solution that is not constrained by traditional transaction costs.²

Your Portfolio, Your Way

- Dundee Summit is a non-discretionary service that puts you in complete control of all investment decisions.
- You will have access to a comprehensive range of investment products and services to fit your needs, including access to reduced-fee investment funds.³
- By focusing on what is best for your portfolio, you will have the freedom and flexibility to tailor your portfolio to address your personal preferences and financial goals.

Experienced Advice and Guidance

- Your Dundee Advisor will help you evaluate your financial situation and develop an approach that reflects your objectives, investment time horizon, risk tolerance and income needs.
- As your personal circumstances evolve, your Dundee Advisor will work with you to adjust and refine your investment strategy.
- You will have a direct relationship with your Dundee Advisor, an experienced and proven professional, ensuring a superior level of service and support.

Simple Asset-Based Fee

- A simple and predictable asset-based fee lets you implement investment decisions without traditional transaction costs.²
- The fee is a simple percentage of the assets held in enrolled accounts, and the overall rate declines as the value of your assets grow.
- Annual administration fees for RRSPs, RRIFs and other registered plan types are waived.

Additional Features and Benefits of Dundee Summit

- Detailed consolidated account statements issued on a regular basis.
- Online account access via Dundee WealthTracker.
- Access to Dundee's highly regarded economic, equity and investment fund research.
- Asset-based fee is conveniently charged on a monthly basis, with an Annual Summary of Fees report.
- Certain non-chargeable investments may be held in your Dundee Summit account(s) for convenience, but are discounted from the asset-based fee calculation.

Talk to your Dundee Advisor to find out more about Dundee Summit and to ascertain its suitability for your financial needs.

The Dundee Summit Advisory Account Service ("Dundee Summit") is offered by DundeeWealth Inc. subsidiaries: Dundee Securities Corporation, Dundee Private Investors Inc. and Dundee Private Investors Ltd. (collectively, "Dundee Wealth"). Investors should consult with a Dundee Advisor and review the Dundee Summit Advisory Account Service Agreement before enrolling in Dundee Summit.

¹ Dundee Summit is not intended nor is it suitable for day trading or other excessive securities, options or investment funds trading activity.

² Additional fees and expenses may apply, such as for purchases of new securities issues, including equity, debt and market linked investments created by DundeeWealth Inc. subsidiaries. If trading exceeds certain thresholds, trading surcharges will apply. All trades by accounts participating on a combined basis will be aggregated for purposes of determining whether a trading surcharge applies. DundeeWealth Inc., through its subsidiaries, may earn additional compensation on such underwritings and trading surcharges.

³ Equity and fixed income securities and derivatives may not be available to clients of Dundee Private Investors Inc. and Dundee Private Investors Ltd. due to securities regulations. Reduced fee investment funds are available for all client accounts enrolled in Dundee Summit.