



Affiliate Listing

Accounting Firms

- [BDO Canada LLP](#)
- [Deloitte LLP](#)
- [KPMG LLP](#)
- [PricewaterhouseCoopers LLP](#)
- [Shimmerman Penn LLP](#)

Consultants & Others

- [Asset Risk Consultants Limited](#)
- [Baynes & White](#)
- [SGGG Fund Services Inc.](#)

Custodians

- [Aviso Wealth Inc.](#)
- [Fidelity Clearing Canada ULC](#)
- [Laurentian Bank](#)
- [National Bank Independent Network \(NBIN\)](#)
- [Northern Trust Company, Canada](#)
- [Pinnacle Correspondent Services](#)
- [Raymond James Ltd.](#)
- [RBC Investor & Treasury Services](#)
- [State Street Global Services](#)

Insurance

- [HUB International HKMB Limited](#)
- [Chubb Insurance Company of Canada](#)

Law & Compliance Support Firms

**Many of the law firms listed below provide both law and compliance support; ask the provider for further details.*

Law

- [AUM Law](#)
- [Borden Ladner Gervais LLP](#)
- [Fasken Martineau DuMoulin LLP](#)
- [McCarthy Tétrault LLP](#)
- [McMillan LLP](#)
- [Osler Hoskin & Harcourt LLP](#)
- [Weirfoulds LLP](#)

Compliance

- [ACA Compliance Group](#)
- [Ara Compliance Support](#)
- [Canadian Compliance & Regulatory Law](#)
- [Comarm Solutions Inc.](#)
- [Trinity Compliance Partners Inc.](#)

Technology Solution Partners

- [Broadridge Financial Solutions Inc.](#)
- [Fundata Canada Inc.](#)
- [Infinite Investment Systems Ltd.](#)
- [IRESS Market Technology Canada LP](#)
- [SS&C / Advent](#)



Accounting Firms

BDO Canada LLP

66 Wellington Street West, Suite 3600
Toronto, Ontario
M5K 1H1

416-865-0200

www.bdo.ca

Sam Khoury – skhoury@bdo.ca

Deloitte LLP

181 Bay Street
Bay Wellington Tower - Brookfield Place, Suite 1400
Toronto, Ontario
M5J 2V1

416-601-6150

www.deloitte.ca

Michael Darroch – mdarroch@deloitte.ca

Victoria Loutsiv – vloutsiv@deloitte.ca

KPMG LLP

333 Bay Street, Suite 4600
Toronto, Ontario
M5H 2S5

416-777-8500

www.kpmg.ca

Paula Foster – pmfoster@kpmg.ca

Paritosh Gambhir – pgambhir@kpmg.ca

PricewaterhouseCoopers LLP

18 York Street, Suite 2600
Toronto, Ontario
M5J 0B2

416-863-1133

www.pwc.com

Derek Hatoum – derek.hatoum@pwc.com

Shimmerman Penn LLP

30 St. Clair Avenue West, Suite 400
Toronto, Ontario
M4V 3A1

416-964-7200

www.spllp.com

Maj-Lis Vettoretti – mvettoretti@spllp.com



Consultants & Other

Asset Risk Consultants Limited

7 New Street, St Peter Port
Guernsey, Channel Islands
GY1 2PF, UK

+44 (0)1481 817777

www.assetrisk.com

Andrew O'Neill – andrew.oneill@assetrisk.com

Baynes & White

20 Eglinton Avenue West, Suite 1006
Toronto, Ontario
M4R 1K8

416-863-9159

www.bayneswhite.com

Pamela Martin – pmartin@bayneswhite.com

SGGG Fund Services Inc.

121 King Street West, Suite 300
Toronto, Ontario
M5H 3T9

416-855-7247

www.sgggfsi.com

Dennis MacPherson – dmacpherson@sgggfsi.com

Custodians

Aviso Wealth Inc.

151 Yonge Street, Suite 1200
Toronto, Ontario
M5G 2N7

604-209-2575

www.aviso.ca/en/

Kevin Vanderheyden – kvanderheyden@aviso.ca

Fidelity Clearing Canada ULC

483 Bay Street, South Tower, Suite 200
Toronto, Ontario
M5G 2N7

416-216-2600

clearingcanada.fidelity.com

Scott MacKenzie – scott.mackenzie@fmr.com



Laurentian Bank Institutional Services

1981 McGill Collège Avenue, Suite 1900
Montréal, Québec
H3A 3K3

514-350-2800

www.vmbi.ca

Steve Ranco – rancos@vmbi.ca

National Bank Independent Network (NBIN)

130 King Street West, Suite 3000
Toronto, Ontario
M5X 1J9

416-542-2466

www.nbcn.ca

Cara Benvenuti – cara.benvenuti@bnc.ca

Northern Trust Company, Canada

145 King Street West, Suite 1910
Toronto, Ontario
M5H 1J8

416-775-2209

www.northerntrust.com

Descia Milinkovich – descia.milinkovich@ntrs.com

Pinnacle Correspondent Services

609 Granville Street, Suite 2200
Vancouver, British Columbia
V7Y 1H2

604-643-7300

www.pcsc.ca

Simon Jackson – simon.jackson@pcsc.ca

Raymond James Ltd.

40 King Street West, Suite 5300
Toronto, Ontario
M5H 3Y2

416-777-7000

www.raymondjames.ca

David Burnes – david.burnes@raymondjames.ca

RBC Investor & Treasury Services

155 Wellington Street West, Street Level
P.O. Box 7500, Station A
Toronto, Ontario
M5W 1P9

416-955-5055

www.rbcits.com

David Linds – david.linds@rbc.com



State Street Global Services

30 Adelaide Street East, Suite 1100
Toronto, Ontario
M5C 3G6

647-775-5923

www.statestreet.com

Robyn Thompson – rthompson5@statestreet.com

Insurance

HUB International HKMB Limited

595 Bay Street, Suite 900
Toronto, Ontario
M5G 2E3

416-597-7702

1-800-232-2024

www.hkmb.com

Matthew Studley – matthew.studley@hubinternational.com

Chubb Insurance Company of Canada

199 Bay Street, Suite 2500
Toronto, Ontario
P. O. Box 139 Commerce Court Postal Station
M5L 1E2

416-359-3222

1-800-268-9344

www.chubb.com

Carol McLellan – cmclellan@chubb.com

Law & Compliance Support Firms

**Many of the firms listed below provide both law and compliance support*

Law

AUM Law

175 Bloor Street East, Suite 303, South Tower
Toronto, Ontario
M4W 3R8

416-966-2004

www.aumlaw.com

Kevin Cohen – kcohen@aumlaw.com

Borden Ladner Gervais LLP

Bay Adelaide Centre, East Tower
22 Adelaide Street West, Suite 3400
Toronto, Ontario
M5H 4E3

416-367-6400

1-855-660-6003

www.blgcanada.com

Rebecca Cowdery – rcowdery@blg.com



Fasken Martineau DuMoulin LLP

333 Bay Street, Suite 2400, P.O. Box 20
Toronto, Ontario
M5H 2T6

416-868-3422

www.fasken.com

Garth J. Foster – gfoster@fasken.com

McCarthy Tétrault LLP

66 Wellington Street West, Suite 5300, Box 48
Toronto, Ontario
M5K 1E6

416-601-8200

www.mccarthy.ca

Sean D. Sadler – ssadler@mccarthy.ca

McMillan LLP

181 Bay Street, Suite 4400
Toronto, Ontario
M5J 2T3

416-865-7000

www.mcmillan.ca

Jason A. Chertin – jason.chertin@mcmillan.ca

Osler Hoskin & Harcourt LLP

1 First Canadian Place, Suite 6200, PO Box 50
Toronto, Ontario
M5X 1B8

416-362-2111

www.osler.com

John Black – jblack@osler.com

WeirFoulds LLP

66 Wellington Street West, Suite 4100
P.O. Box 35, TD Bank Tower
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416-365-1110

www.weirfoulds.com

Jennie Baek – jbaek@weirfoulds.com

Compliance Support

ACA Compliance Group

525 Bigham Knoll, Suite 200
Jacksonville, Oregon
97530 USA

541-842-8403

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Chase Frei – cfrei@acacompliancegroup.com



Ara Compliance Support

130 King Street West, Suite 1800
Toronto, Ontario
M5X 1E3

416-941-1263

www.aracompliance.com

Vipool Desai – vpool@aracompliance.com

Canadian Compliance & Regulatory Law

257 Wharton Boulevard
Winnipeg, Manitoba
R2Y 0T3

204-297-9338

www.cdncrl.ca

Donald (Don) Campbell – dcampbell@cdncrl.ca

Sean Shore – sshore@cdncrl.ca

Comarm Solutions Inc.

8 King Street East, Suite 1105
Toronto, Ontario
M5C 1B5

416-304-9482

www.comarm.com

Leo Purcell – leopurcell@comarm.com

General – wehelp@comarm.com

Trinity Compliance Partners Inc.

100 King Street West, Suite 5600
Toronto, Ontario
M5X 1C9

416-306-5783

www.trinitycompliancepartners.com

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Technology Solution Providers

Broadridge Financial Solutions, Inc.

4 King Street West, 5th Floor
Toronto, Ontario
M5H 1B6

416-350-0999

<https://www.broadridge.com/ca/>

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Fundata Canada Inc.

38 Lesmill Road
Toronto, Ontario
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www.fundata.com

Brooke Biscoe – brooke.biscoe@fundata.com

Infinite Investment Systems Ltd.

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416-861-0911

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