



## 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](http://www.bdo.ca)

**Sam Khoury – [skhoury@bdo.ca](mailto: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](http://www.deloitte.ca)

**Michael Darroch – [mdarroch@deloitte.ca](mailto:mdarroch@deloitte.ca)**

**Victoria Loutsiv – [vloutsiv@deloitte.ca](mailto:vloutsiv@deloitte.ca)**

### **KPMG LLP**

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

416-777-8500

[www.kpmg.ca](http://www.kpmg.ca)

**Paula Foster – [pmfoster@kpmg.ca](mailto:pmfoster@kpmg.ca)**

**Paritosh Gambhir – [pgambhir@kpmg.ca](mailto:pgambhir@kpmg.ca)**

### **PricewaterhouseCoopers LLP**

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

416-863-1133

[www.pwc.com](http://www.pwc.com)

**Derek Hatoum – [derek.hatoum@pwc.com](mailto:derek.hatoum@pwc.com)**

### **Shimmerman Penn LLP**

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

416-964-7200

[www.spllp.com](http://www.spllp.com)

**Maj-Lis Vettoretti – [mvettoretti@spllp.com](mailto: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](http://www.assetrisk.com)

**Andrew O'Neill** – [andrew.oneill@assetrisk.com](mailto:andrew.oneill@assetrisk.com)

### **Baynes & White**

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

416-863-9159

[www.bayneswhite.com](http://www.bayneswhite.com)

**Pamela Martin** – [pmartin@bayneswhite.com](mailto:pmartin@bayneswhite.com)

### **SGGG Fund Services Inc.**

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

416-855-7247

[www.sgggfsi.com](http://www.sgggfsi.com)

**Dennis MacPherson** – [dmacpherson@sgggfsi.com](mailto:dmacpherson@sgggfsi.com)

## **Custodians**

### **Aviso Wealth Inc.**

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

604-209-2575

[www.aviso.ca/en/](http://www.aviso.ca/en/)

**Kevin Vanderheyden** – [kvanderheyden@aviso.ca](mailto:kvanderheyden@aviso.ca)

### **Fidelity Clearing Canada ULC**

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

416-216-2600

[clearingcanada.fidelity.com](http://clearingcanada.fidelity.com)

**Scott MacKenzie** – [scott.mackenzie@fmr.com](mailto:scott.mackenzie@fmr.com)



### **Laurentian Bank Institutional Services**

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

514-350-2800

[www.vmbi.ca](http://www.vmbi.ca)

**Steve Ranco – [rancos@vmbi.ca](mailto:rancos@vmbi.ca)**

### **National Bank Independent Network (NBIN)**

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

416-542-2466

[www.nbcn.ca](http://www.nbcn.ca)

**Cara Benvenuti – [cara.benvenuti@bnc.ca](mailto:cara.benvenuti@bnc.ca)**

### **Northern Trust Company, Canada**

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

416-775-2209

[www.northerntrust.com](http://www.northerntrust.com)

**Descia Milinkovich – [descia.milinkovich@ntrs.com](mailto:descia.milinkovich@ntrs.com)**

### **Pinnacle Correspondent Services**

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

604-643-7300

[www.pcsc.ca](http://www.pcsc.ca)

**Simon Jackson – [simon.jackson@pcsc.ca](mailto:simon.jackson@pcsc.ca)**

### **Raymond James Ltd.**

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

416-777-7000

[www.raymondjames.ca](http://www.raymondjames.ca)

**David Burnes – [david.burnes@raymondjames.ca](mailto: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](http://www.rbcits.com)

**David Linds – [david.linds@rbc.com](mailto:david.linds@rbc.com)**



## **State Street Global Services**

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

647-775-5923

[www.statestreet.com](http://www.statestreet.com)

**Robyn Thompson** – [rthompson5@statestreet.com](mailto: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](http://www.hkmb.com)

**Matthew Studley** – [matthew.studley@hubinternational.com](mailto: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](http://www.chubb.com)

**Carol McLellan** – [cmclellan@chubb.com](mailto: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](http://www.aumlaw.com)

**Kevin Cohen** – [kcohen@aumlaw.com](mailto: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](http://www.blgcanada.com)

**Rebecca Cowdery** – [rcowdery@blg.com](mailto: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](http://www.fasken.com)

**Garth J. Foster** – [gfoster@fasken.com](mailto:gfoster@fasken.com)

### **McCarthy Tétrault LLP**

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

416-601-8200

[www.mccarthy.ca](http://www.mccarthy.ca)

**Sean D. Sadler** – [ssadler@mccarthy.ca](mailto:ssadler@mccarthy.ca)

### **McMillan LLP**

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

416-865-7000

[www.mcmillan.ca](http://www.mcmillan.ca)

**Jason A. Chertin** – [jason.chertin@mcmillan.ca](mailto: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](http://www.osler.com)

**John Black** – [jblack@osler.com](mailto:jblack@osler.com)

### **WeirFoulds LLP**

66 Wellington Street West, Suite 4100  
P.O. Box 35, TD Bank Tower  
Toronto, Ontario  
M5K 1B7

416-365-1110

[www.weirfoulds.com](http://www.weirfoulds.com)

**Jennie Baek** – [jbaek@weirfoulds.com](mailto:jbaek@weirfoulds.com)

### **Compliance Support**

#### **ACA Compliance Group**

525 Bigham Knoll, Suite 200  
Jacksonville, Oregon  
97530 USA

541-842-8403

[www.acacompliancegroup.com](http://www.acacompliancegroup.com)

**Chase Frei** – [cfrei@acacompliancegroup.com](mailto:cfrei@acacompliancegroup.com)



## **Ara Compliance Support**

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

416-941-1263

[www.aracompliance.com](http://www.aracompliance.com)

**Vipool Desai** – [vpool@aracompliance.com](mailto:vpool@aracompliance.com)

## **Canadian Compliance & Regulatory Law**

257 Wharton Boulevard  
Winnipeg, Manitoba  
R2Y 0T3

204-297-9338

[www.cdncrl.ca](http://www.cdncrl.ca)

**Donald (Don) Campbell** – [dcampbell@cdncrl.ca](mailto:dcampbell@cdncrl.ca)

**Sean Shore** – [sshore@cdncrl.ca](mailto:sshore@cdncrl.ca)

## **Comarm Solutions Inc.**

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

416-304-9482

[www.comarm.com](http://www.comarm.com)

**Leo Purcell** – [leopurcell@comarm.com](mailto:leopurcell@comarm.com)

**General** – [wehelp@comarm.com](mailto:wehelp@comarm.com)

## **Trinity Compliance Partners Inc.**

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

416-306-5783

[www.trinitycompliancepartners.com](http://www.trinitycompliancepartners.com)

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**Dave Santiago** – [dsantiago@trinitycompliancepartners.com](mailto:dsantiago@trinitycompliancepartners.com)

## **Technology Solution Providers**

### **Broadridge Financial Solutions, Inc.**

4 King Street West, 5<sup>th</sup> Floor  
Toronto, Ontario  
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416-350-0999

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

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**Mya Christianson** – [mya.christianson@broadridge.com](mailto:mya.christianson@broadridge.com)



### **Fundata Canada Inc.**

38 Lesmill Road  
Toronto, Ontario  
M3B 2T5

416-445-5534

[www.fundata.com](http://www.fundata.com)

**Brooke Biscoe** – [brooke.biscoe@fundata.com](mailto:brooke.biscoe@fundata.com)

### **Infinite Investment Systems Ltd.**

77 King Street West, Suite 3108, PO Box 266  
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M5K 1J5

416-861-0911

[www.inf-systems.com](http://www.inf-systems.com)

**Mike Zegers** – [mike.zegers@inf-systems.com](mailto:mike.zegers@inf-systems.com)

### **IRESS Market Technology Canada LP**

333 Bay Street, Suite 720 P.O. Box 45  
Toronto, Ontario  
M5H 2R2

416-907-9200

[www.iress.ca](http://www.iress.ca)

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**Grant Kirby** – [gkirby@iress.ca](mailto:gkirby@iress.ca)

### **SS&C / Advent**

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