PARTNERS PROGRAM MANAGER PROFILE

MAWER
Be Boring. Make Money.™

MAWER INVESTMENT MANAGEMENT

PARTNERS MANDATES

Mawer Investment Management provides the following professional investment portfolio management services for the Raymond James Partners Program:

- Tax-Efficient Conservative Balanced
- Tax-Efficient Moderate Balanced
- Tax-Efficient Balanced Growth
- Tax-Efficient Equity
- Tax-Efficient Global Equity

HISTORY

Mawer Investment Management is a Calgary-based independent investment counseling firm, with offices in Calgary, Toronto, and Singapore. Since its establishment in 1974, Mawer has grown to become one of Canada's most respected investment management companies with over $77.1 billion in assets.

PORTFOLIO MANAGERS

Neeraj Jain, CFA, Institutional Portfolio Manager

Neeraj Jain is a member of the institutional client management team at Mawer Investment Management Ltd., which he joined in 2020. He is responsible for the management and servicing of institutional clients.

Prior to joining Mawer, Mr. Jain was Head of Institutional Business Development at CGOV Asset Management before its acquisition by Fiera Capital in May 2018, after which he focused on institutional clients, Indigenous communities, and consultants in Western Canada. Mr. Jain also worked at AGF Investments as Head of Institutional Global Client service, and began his career in investment management research, working at AIMCO and Mercer Investment Consulting.

Mr. Jain earned a Bachelor of Mathematics degree from the University of Waterloo. He is a Chartered Financial Analyst (CFA) charterholder with investment experience since 2003. He is a member of the CFA Institute and the CFA Society Toronto.

INVESTMENT PHILOSOPHY & STYLE

- Focus on attractive long-term, risk-adjusted, after-tax returns.
- Invest in wealth-creating companies, with excellent management teams that are available at discounts to intrinsic value.
- In balanced mandates, bonds are used to mitigate risk.
- Employ strategic asset allocation based on an evaluation of market efficiency, opportunity set, long-term economic growth prospects, and attractiveness of risk premiums.
- Ongoing monitoring and rebalancing of the model to avoid asset mix drift.

KEY FACTS

- Over 48 years of managing for pension funds, foundations and private clients.
- 40 investment professionals across all major asset classes.
- Specialized expertise with tax-efficient portfolios.