

Seasoned Financial Advisers Ready to Serve Your Needs

Tradex is a licensed mutual fund dealer in Ontario, Quebec and British Columbia and our seasoned team of Blair Cooper and Brien Marshall is available to offer expert, unbiased financial advice and portfolio reviews. They have in-depth knowledge on a wide range of financial products, including all Canadian mutual fund families. They are constantly monitoring the performance of the various mutual funds through published reports as well as through direct contact with the portfolio managers and fund company representatives. Blair and Brien are very ably assisted by Debby Wright, who has been with Tradex for over 12 years, and Luc Bisailon who joined Tradex in May 2007 upon graduating from the University of Ottawa with a Bachelor of Commerce Degree.



Blair Cooper
B.Sc., MBA
Senior Vice-President



Brien Marshall
Bach. Comm., CFP
Senior Vice-President

Blair Cooper

Blair received a Bachelor of Science degree from the University of Western Ontario in 1985 and a MBA degree from Queen's University in 1987. Before joining Tradex in August, 2000 Blair was with the Bank of Montreal for 14 years in increasingly responsible positions. At the time of leaving the Bank, he was Community Manager for the North Bay region.

Brien Marshall

Brien received a Bachelor of Commerce degree from Carleton University in 1988 and accreditation as a Certified Financial Planner in 1994. He is the past President of the local chapter of the Canadian Association of Pre-Retirement Planners and a long-time member of Toastmasters International. Brien joined Tradex in 1991 after having gained valuable experience with a national mutual fund dealer.

Free, No-Obligation Portfolio Reviews

Our portfolio reviews and subsequent recommendations are tailored to your specific needs taking into account your existing holdings, risk tolerance, financial position and individual preferences. Since Tradex is owned by its investors and operates on an "at cost" basis for the benefit of its investors we are very proud of the fact that we offer straightforward, unbiased advice to those individuals who wish to take advantage of this service. As rules of thumb, we emphasize:

- Keeping your costs as low as possible.
- Building a well-diversified portfolio with a mix of asset classes and investment management styles (growth and value styles).
- Ensuring that your investments are properly allocated between registered and taxable accounts to minimize your tax burden.
- Buying and holding mutual funds that have a combination of low management expense ratios and proven long-term performance.
- Making only those changes to your existing portfolio that are necessary.
- If you have funds with deferred sales charges, releasing the 10% "free" units each year in order to give you greater flexibility.
- Generally avoiding balanced mutual funds or "wrap account" arrangements because the associated costs are normally higher and the net performance lower than holding an equivalent combination of top quality equity, dividend and bond funds.
- Where appropriate, purchasing GICs or holding a portion of your funds in high yield daily interest savings accounts.

If, after the no-cost, no-obligation review, you choose to transfer your holdings to be under our administration, Tradex will pay any applicable transfer fees. For more information please call us at 613-233-3394 or 1-800-567-3863.